



Livelihoods through Sports and Physical Activity: Opportunities and Prospects



Sports and Society
Accelerator

Foreword

As India grows, so does the opportunity to harness sports and physical activity (SAPA) for skilling, employment, and livelihood generation. Strategic investments in SAPA can unlock growth across allied sectors such as tourism, manufacturing, event management, and infrastructure, particularly as India aspires to host mega sporting events like the Olympic Games and Commonwealth Games. The National Sports Policy underscores this vision, positioning sports as both a social good and an economic driver of national growth.

To build a fully active and *Viksit Bharat*, it is essential to recognize how SAPA can fuel economic growth while opening new opportunities.

This primer highlights preliminary insights from six key case studies drawn from our work and introduces a visioning tool for shaping India's SAPA ecosystem.

This work has been prepared by the Sports and Society Accelerator (SSA), an independent, not-for-profit National Sports Promotion Organisation focused on enabling the SAPA ecosystem in India. It has been authored by Dr. Aishwarya Ramachandran, with key contributions from SSA's co-founders Nandan Kamath and Desh Gaurav Sekhri, along with team members Mridul Kataria and Sugandha Vats.

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Key Takeaways

- ➡ **Policy momentum is firmly behind SAPA**, with national and state frameworks positioning it as a driver of skilling, employment, entrepreneurship, and economic growth.
- ➡ **SAPA can become a growth engine for India**, expanding from 0.1% of GDP today to up to ₹50 lakh crore ($\approx 2\%$ of GDP) by 2047.
- ➡ **Up to 3 crore jobs can be created by 2047**, across athletes, coaches, manufacturing, infrastructure, tourism, and allied services.
- ➡ **Expanding the vocabulary of SAPA jobs is critical**, from grassroots trainers and event managers to physiotherapists, analysts, equipment designers, and wellness professionals.
- ➡ **A whole-of-system approach is needed**, combining policy, capacity, skilling, and ecosystem partnerships to unlock SAPA's full economic and social potential.

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The Opportunity



Policy Momentum for Harnessing SAPA

National and state-level policies are increasingly prioritising SAPA as a sector for skilling, employment, and entrepreneurship - recognising its potential as a driver of economic growth.



The **National Sports Policy 2025** recognises sports as a driver of social and economic development, with an emphasis on sports tourism, equipment manufacturing, and entrepreneurship. It also positions sports as a viable career option through dual pathways, structured training, and strong capacity building across the ecosystem.



The draft **National Skill Development and Entrepreneurship Policy 2025** identifies sports as a priority skilling sector, with focus on reskilling, upskilling, and emerging roles



The **National Education Policy 2020** integrates sports into education to promote holistic development, life skills, and experiential learning.



State sports policies are also emphasising the broader economic potential of SAPA in terms of skilling, career pathways, and industry growth through manufacturing, sports science, tourism, incentives for sports goods, trained personnel, and positioning sports as a contributor to GDP.

Making India a Sports-Forward Nation

Powered by strong policy momentum, the SAPA ecosystem is witnessing a significant push in manufacturing, tourism, mega-events, and global positioning.

The country is actively pursuing **sports tourism** and **mega-event hosting opportunities** with the **2030 Commonwealth Games** bid with Ahmedabad and a bid for the **2036 Olympic Games**, supported by large-scale infrastructure integrated hospitality development, driving job creation.

The PM has positioned sports manufacturing as a pillar of **Atmanirbhar Bharat**, emphasising “**Make in India**” for sports goods as a global brand and supporting **sports startups** across management, technology, and manufacturing.

This is complemented by plans to expand clusters such as **Meerut and Jalandhar**, which drive nearly 82% of India's sports goods production through **3,000+ units** and **130 exporters**, producing over **300** different sports-related products.

The Ministry of Youth Affairs and Sports has also been **allocated 'Sports Goods Manufacturing'** under the Government of India (Allocation of Business) Rules, signalling a major shift.

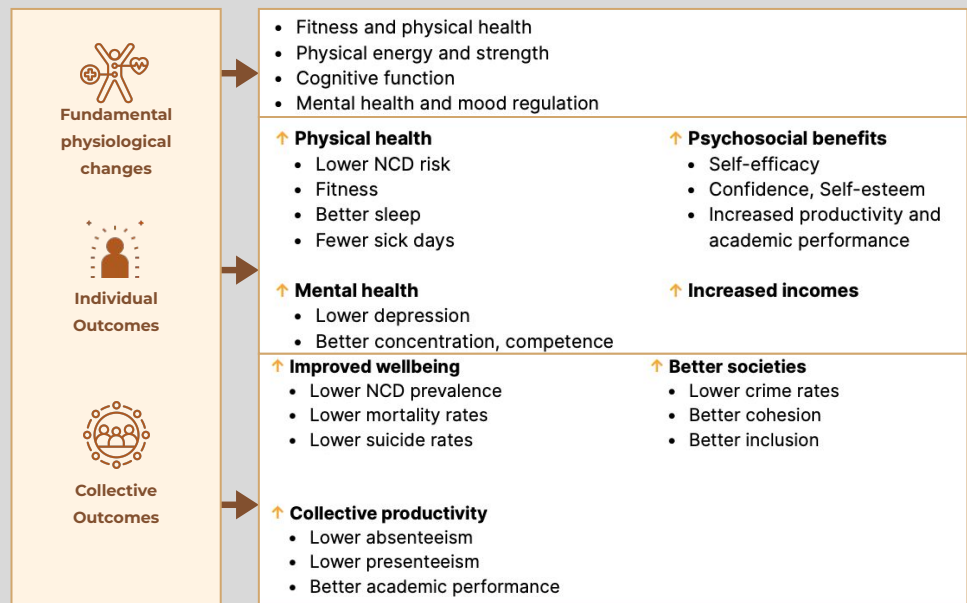
SAPA as a Catalyst for Growth

A *Viksit Bharat* with universal SAPA can unlock multiple benefits by building healthier citizens, boosting productivity, and creating sustainable careers and pathways across sports and allied sectors.

Our first-in-time study for India, the **State of SAPA report*** shows SAPA can be a major driver of the nation's growth story by 2047. It can contribute:



INR 15,00,000 crores
annually to India's GDP



Overview of benefits of SAPA

GDP and Job Contributions from India's SAPA Ecosystem

Current Scenario

- **0.1 %** of India's GDP
- 33.2 lakh jobs in SAPA = **0.5%** of India's workforce

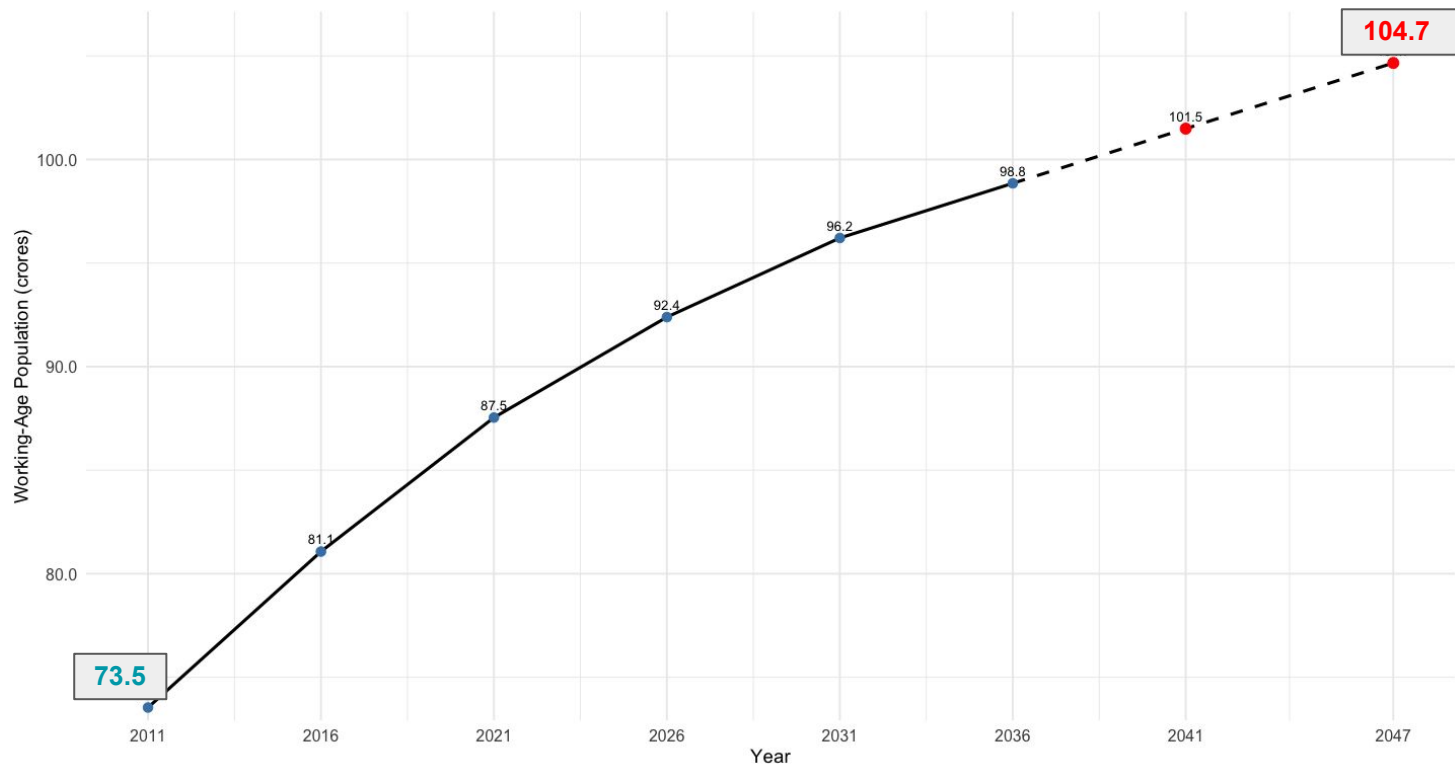


Viksit Bharat Target (2047)

- SAPA contributes up to **2%** of India's GDP, which is in line with sports-aligned countries globally*
- SAPA employs **up to 4%** of India's workforce, which is also in line with global trends*

*Both targets reflect current calculations among sports-aligned developed nations

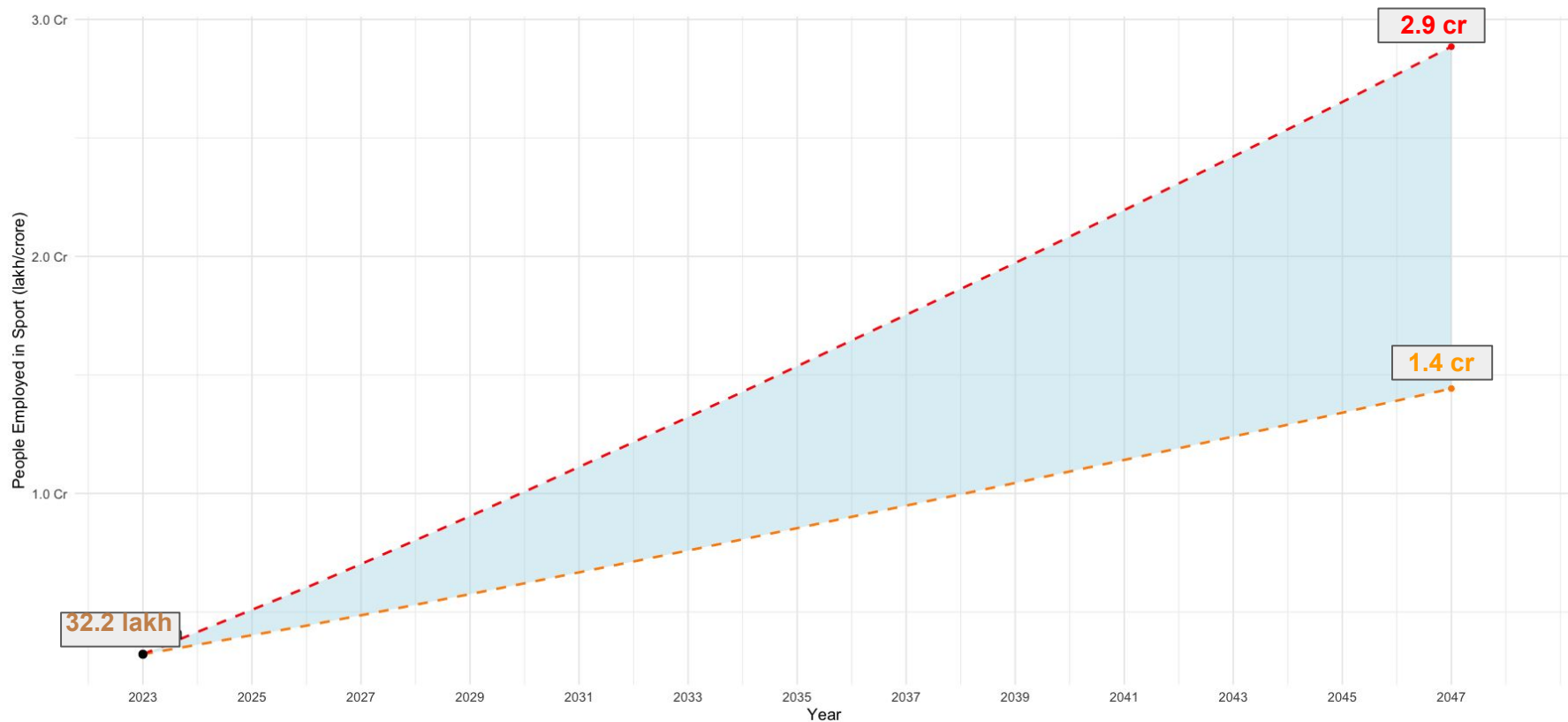
With India's population set to peak in 2048, there is a **growing working-age population** ready to be employed in the SAPA industry



● Source: Technical Group (MoHFW, Jul 2020) ● Source: Linear extrapolation using 2031→2036 absolute growth

Projection Method: Constant annual increase equal to 2031→2036 five-year change (26.4 million over 5 years).

Going from 0.5% of the workforce employed in sport in 2023 to 4% in 2047 can create **up to 3 crore sport-related jobs**



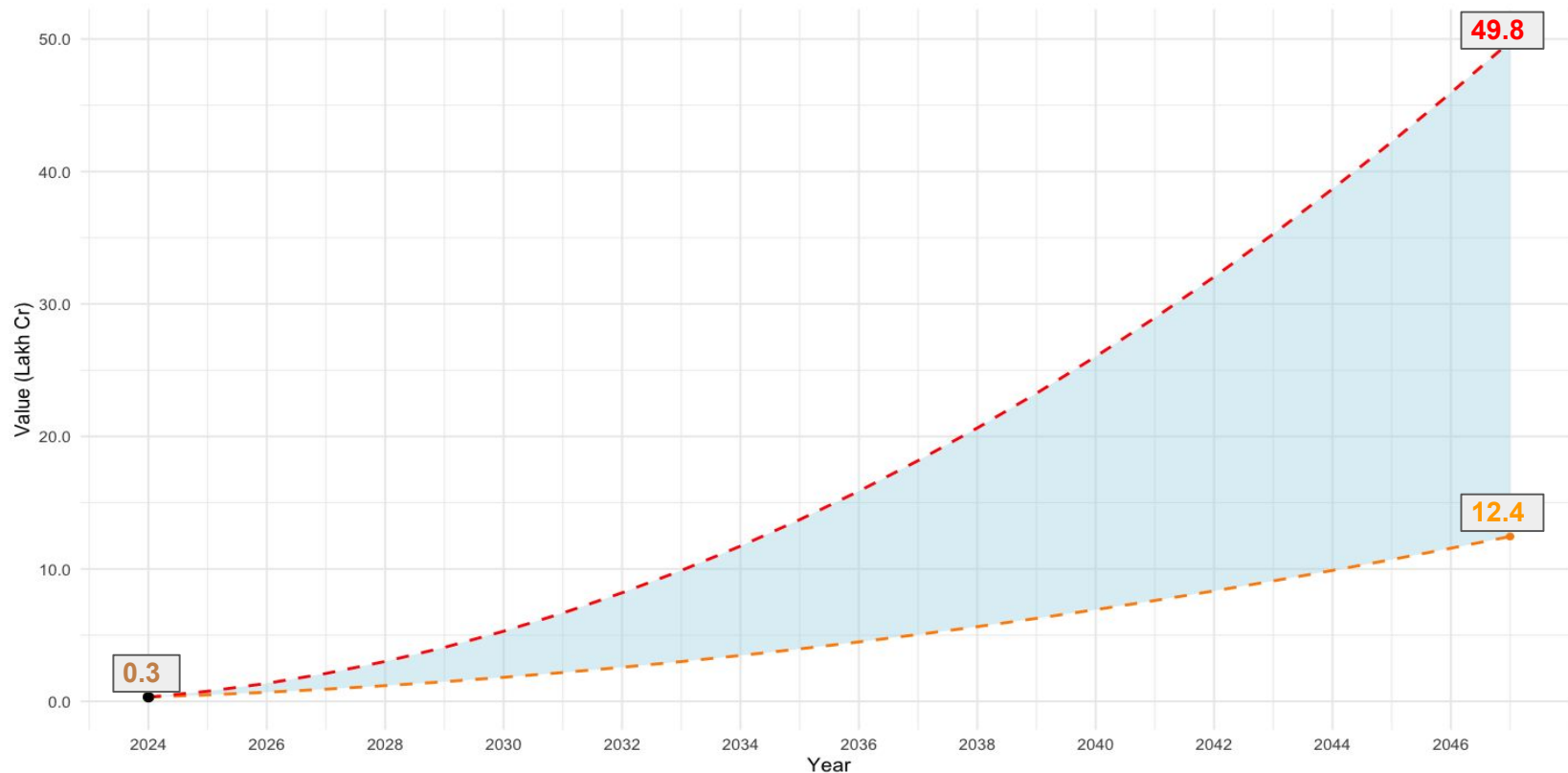
32.2 Lakh = 0.5% of total workforce in 2023-2024 (IBEF, 2024); 64.33 crore = Total employment in 2023-2024 (RBI KLEMS Database);

5-Year population projections for 2021-2036: Technical Group (MoHFW, Jul 2020); Population for 2023: Government of India PIB; Population for 2048: Vollset et al., 2020;

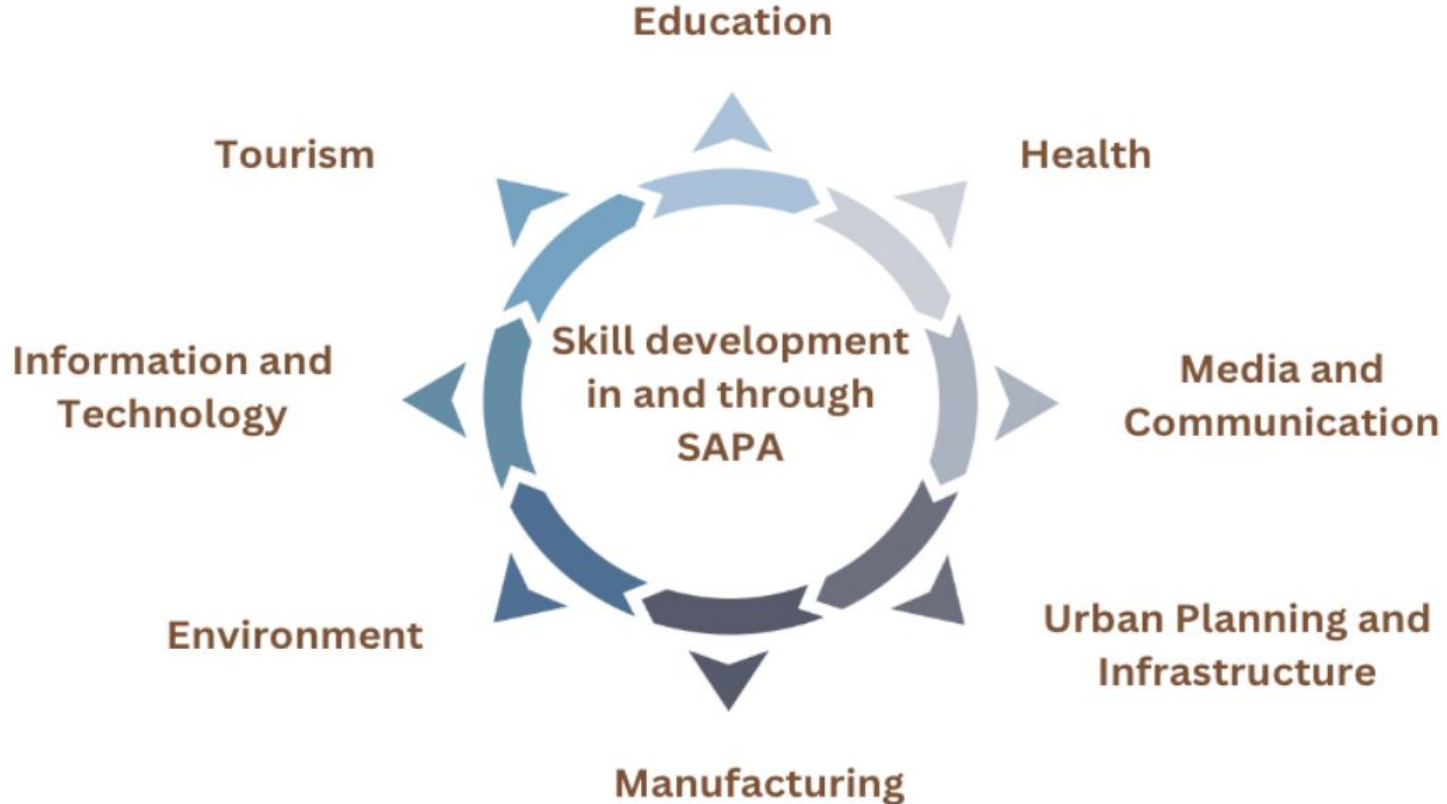
Population for 2047: Projected as 1598.66 million using linear trend between 2036 (1522.3M) and 2048 (1605.6M); 2-4% targets in 2047: Aspirational, based on other major sporting economies (IBEF, 2024)

Lines = linear growth from 2023 (0.5%) to 2047 targets (2-4%); Ribbon = 2%-4% of workforce

From contributing to 0.1% of India's GDP in 2024, the SAPA sector can create **up to ₹50 lakh cr (2% of GDP)** in value by 2047



Where jobs in SAPA are likely to be



Bridging Consumption and Delivery Gaps

Only ~10% of Indian adults engage in sport
Inactivity rates are higher among women and girls, and urban residents

SAPA can prevent



INR 2,50,000 crores

in productivity-related losses

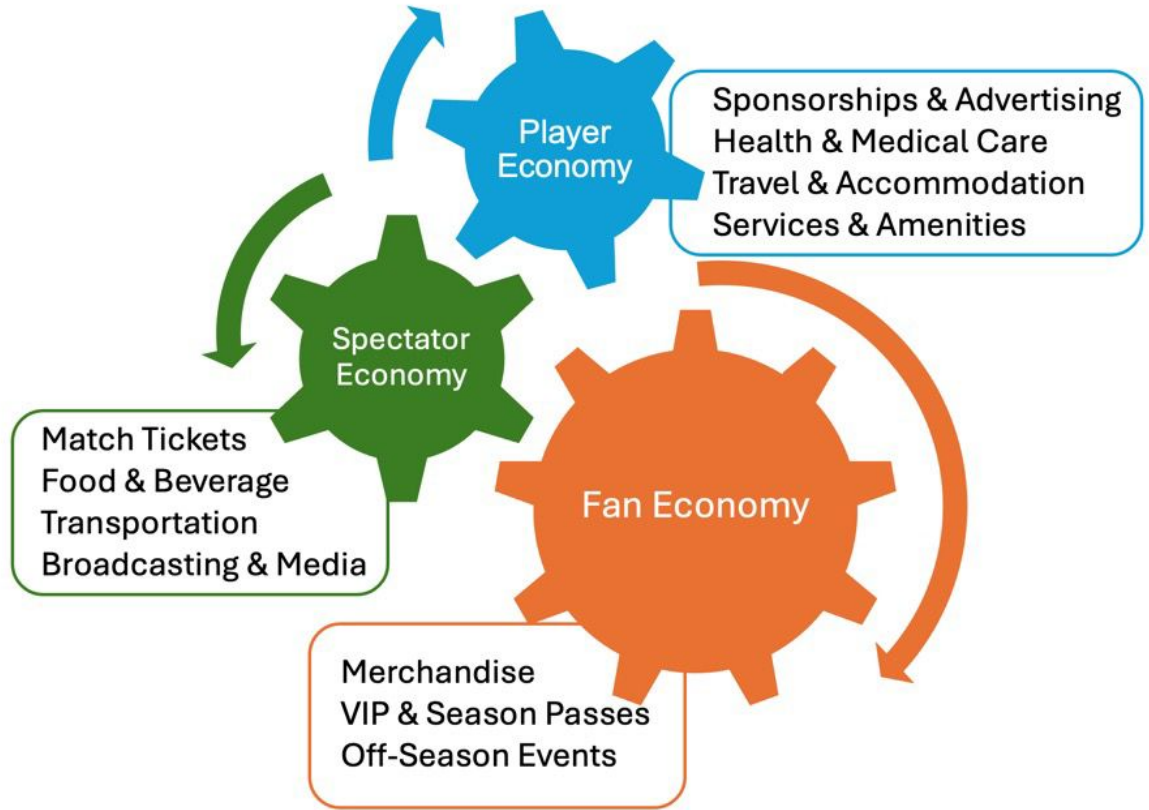
An active population in 2047 can mobilise



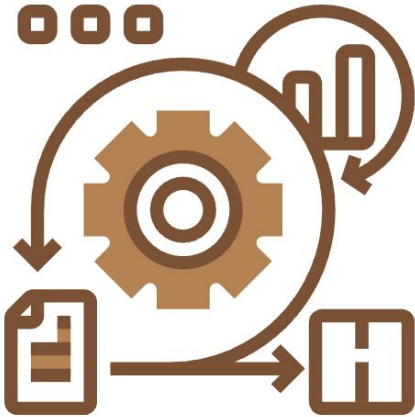
INR 4,50,000 crores

of annual expenditure in the sports ecosystem

What's Driving SAPA Job Creation



Methodology



SSA's 3-Phase Approach

1 Develop a Framework

- Holistic
- Structured
- Modular
- Transparent
- Comprehensive

2 Plug in Real-world Jobs Data

- No. and types of jobs created from existing cases (e.g. the Indian Premier League)
- Include small and large-scale cases

3 Forecast Future Scenarios

- Collaborate with economists, policymakers, and researchers
- Build predictive capability

Expanding the Vocabulary for SAPA Jobs

Directness

Direct | Indirect | Induced

Temporality

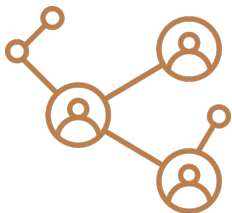
Full-time | Seasonal

Spatiality

Central | Peripheral

Skill Level

Level 1 | Level 2 | Level 3 | Level 4



Directness

Characterised by the causal link between SAPA investments and employment

Direct: A direct job is employment created to fulfill the demand for a product or service.

Indirect: An indirect job is a job that exists to produce the goods and services needed by the workers with direct jobs.

Induced: Employment created by the additional personal spending (e.g., eating at a restaurant) by both direct and indirect workers is classified as an induced job.

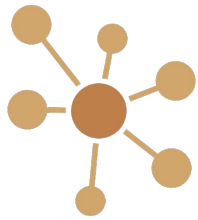


Temporality

Characterised by the duration and timing of employment

Full-time: These jobs typically offer year-round employment with consistent hours and responsibilities. Employees in full-time roles often have stable salaries, benefits, and job security. Examples include coaches, fitness trainers, and sports management professionals who work throughout the year.

Seasonal: These jobs are tied to specific periods, often aligned with sports seasons or events. These roles usually have a defined start and end date, leading to fluctuating employment based on the time of year. Seasonal jobs may include positions like lifeguards, retreat instructors, or event staff for tournaments. These



Spatiality

Characterised by the location and centrality of a job within the SAPA ecosystem

The location of a job in the network of economic activity can influence their connections, interactions, and importance within the SAPA ecosystem.

Central: These can span multiple SAPA sectors and connect across value chains. Examples may include physiotherapists and event managers.

Peripheral: These can be confined to a single activity or niche, with limited spillover effects to other SAPA sectors. Examples may include referees in a specific sport.



Skill Level

Characterised by the qualifications, expertise, and competencies required for employment

Level of skilling: Degree of expertise, training, and experience required to perform a specific job. Determined by academic and technical qualifications, as well as experience requirements, alongside the typical job description for the occupation (see NCO 2015).

Level I: Primary Education (Up to 10 years of formal education and/or informal skills)

Level II: Secondary Education (11-13 years of formal education)

Level III: First University Degree (14-15 years of formal education)

Level IV: Post-Graduate University Degree (More than 15 years of formal education)

NA: Not Applicable

An opportunity for government and policymakers to plan, organize, and respond to the need for a trained SAPA workforce



Target and **optimize resource allocation** and subsidy development



Inform **policy design** and implementation plans



Identify and support key sectors where **capacity-building** is needed



Align with existing vocational and higher **education institutes** and programs



Engage in PPPs with key industries (for industry specific technical/managerial skills)



Develop a blueprint to optimize **overseas employment** in SAPA-aligned jobs

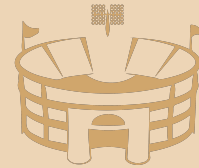
**What jobs will be
created in a holistic
SAPA ecosystem?**

6 Illustrative Cases

**Professional
League**



Stadium



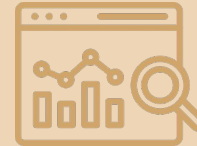
**Public
Park**



**Community
Centre**



**Sports Research
Centre**



**Yoga Retreat
Centre**



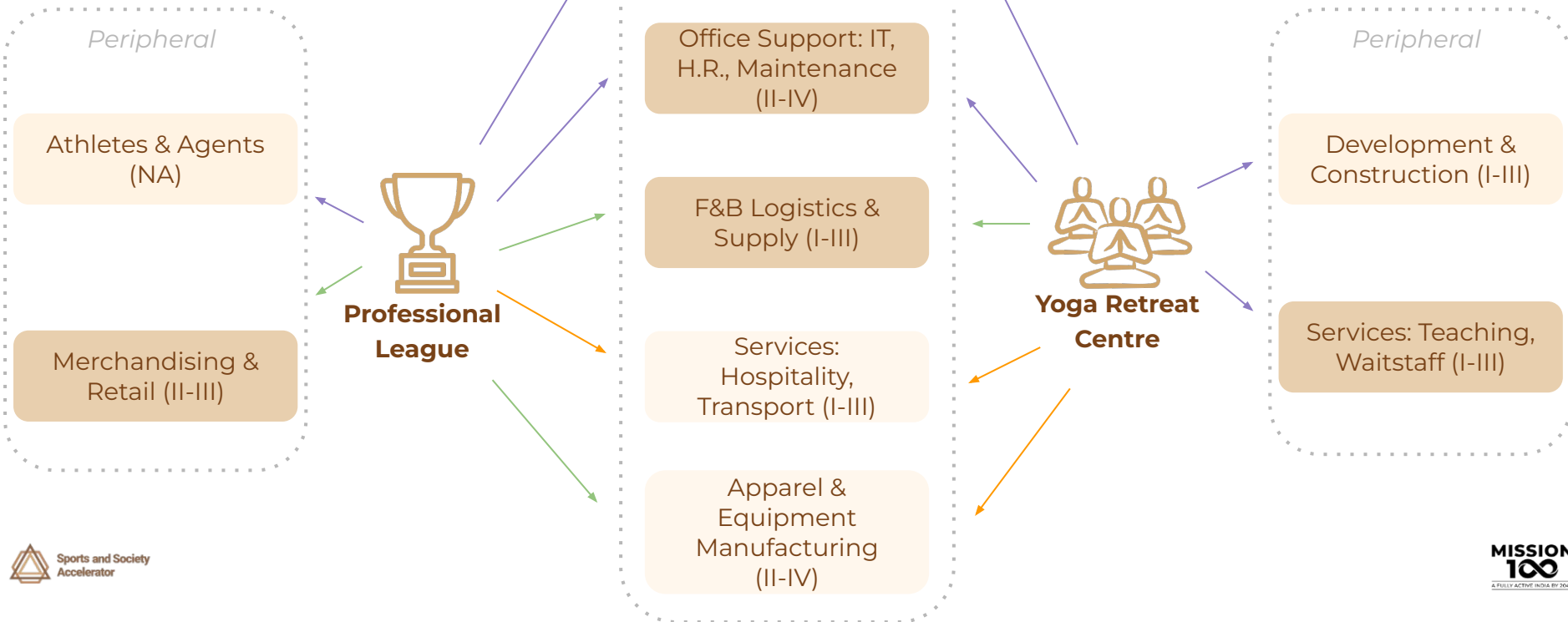
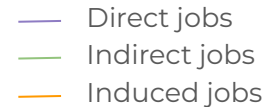
Temporality



Skill Level

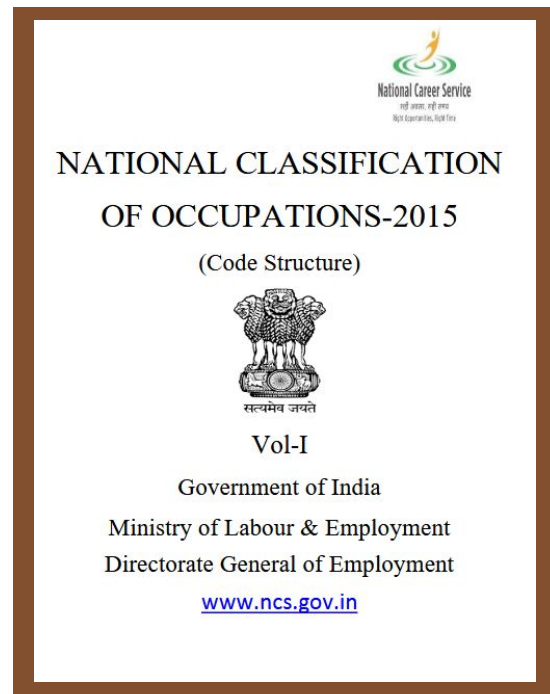
I: Primary Ed
II: Secondary Ed
III: University Degree
IV: Post-Graduate
NA: Not Applicable

Directness

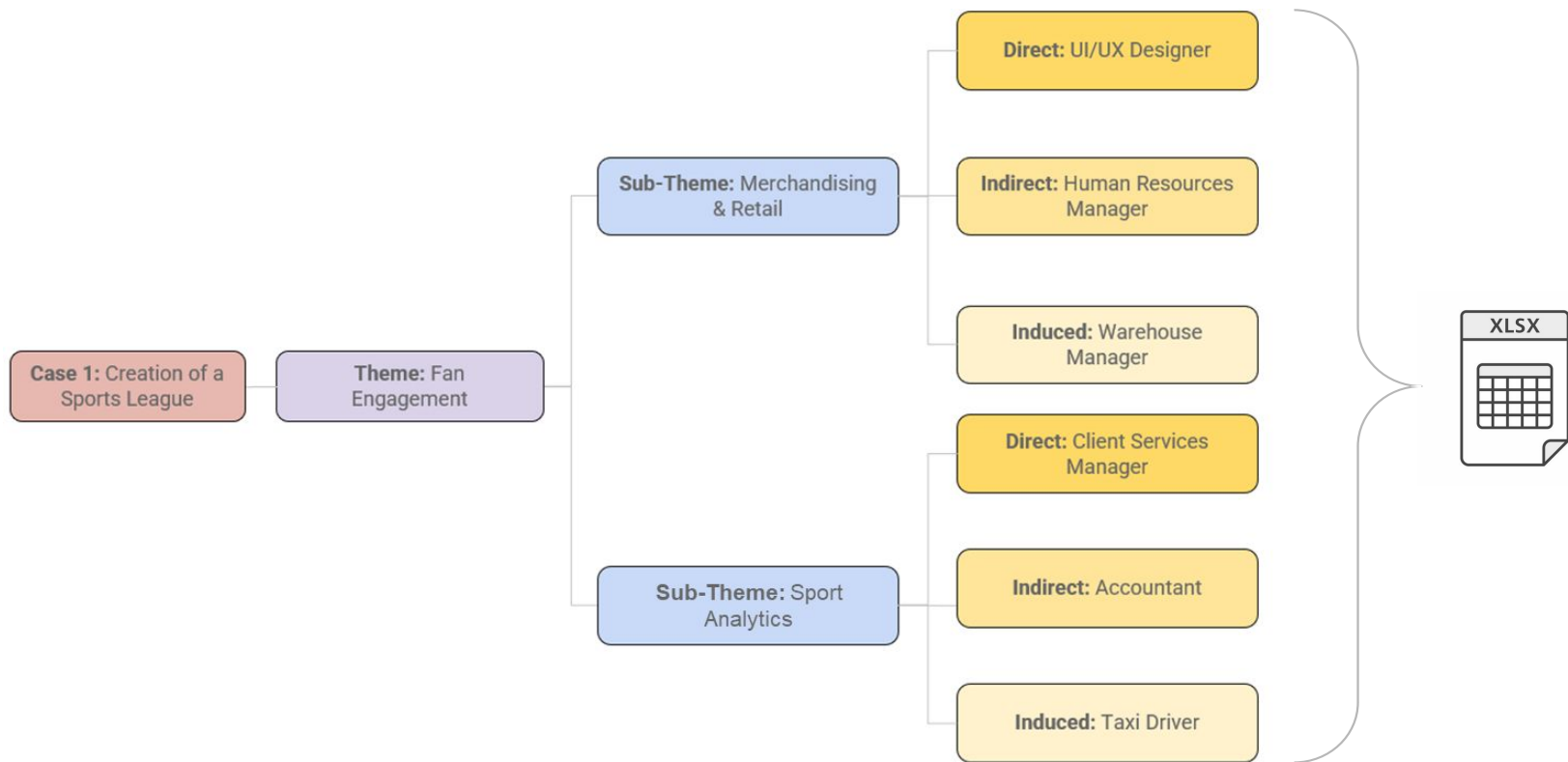


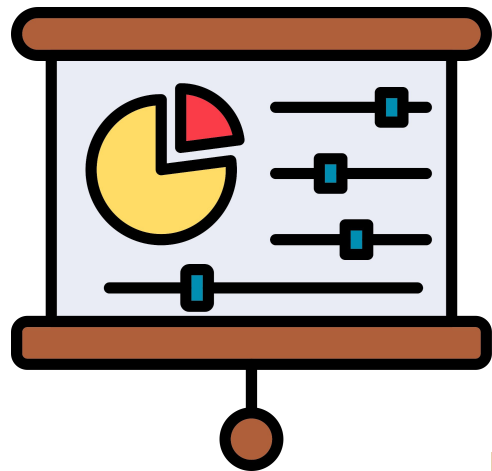
Anchored to National Classification of Occupation (NCO) 2015

- **Hierarchical framework** for classifying occupations in India based on skills, knowledge and work activities
- Aligned with **National Skills Qualifications Framework, International Standard Classification of Occupations**
- **426 unique** SAPA-related occupations matched with NCO 2015
- Match confidence level recorded to identify areas for **future recommendations** and refinement



Classification Structure

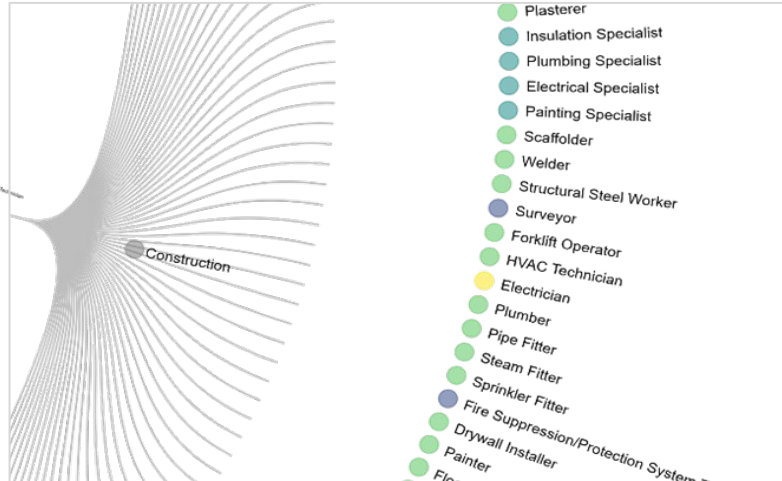
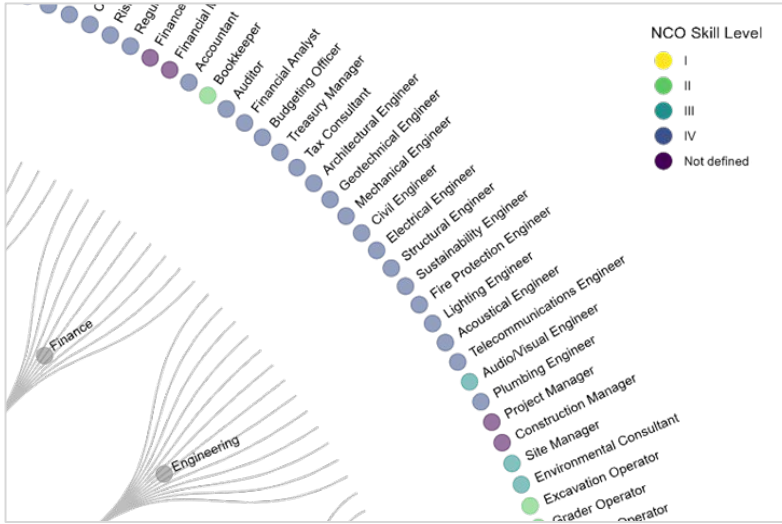
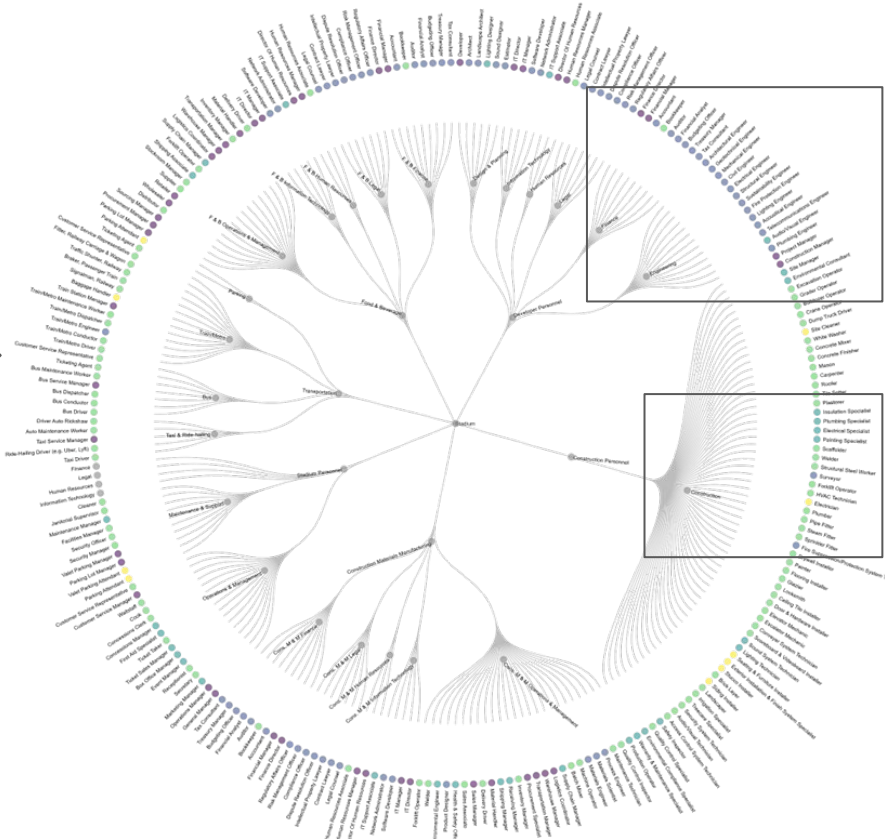




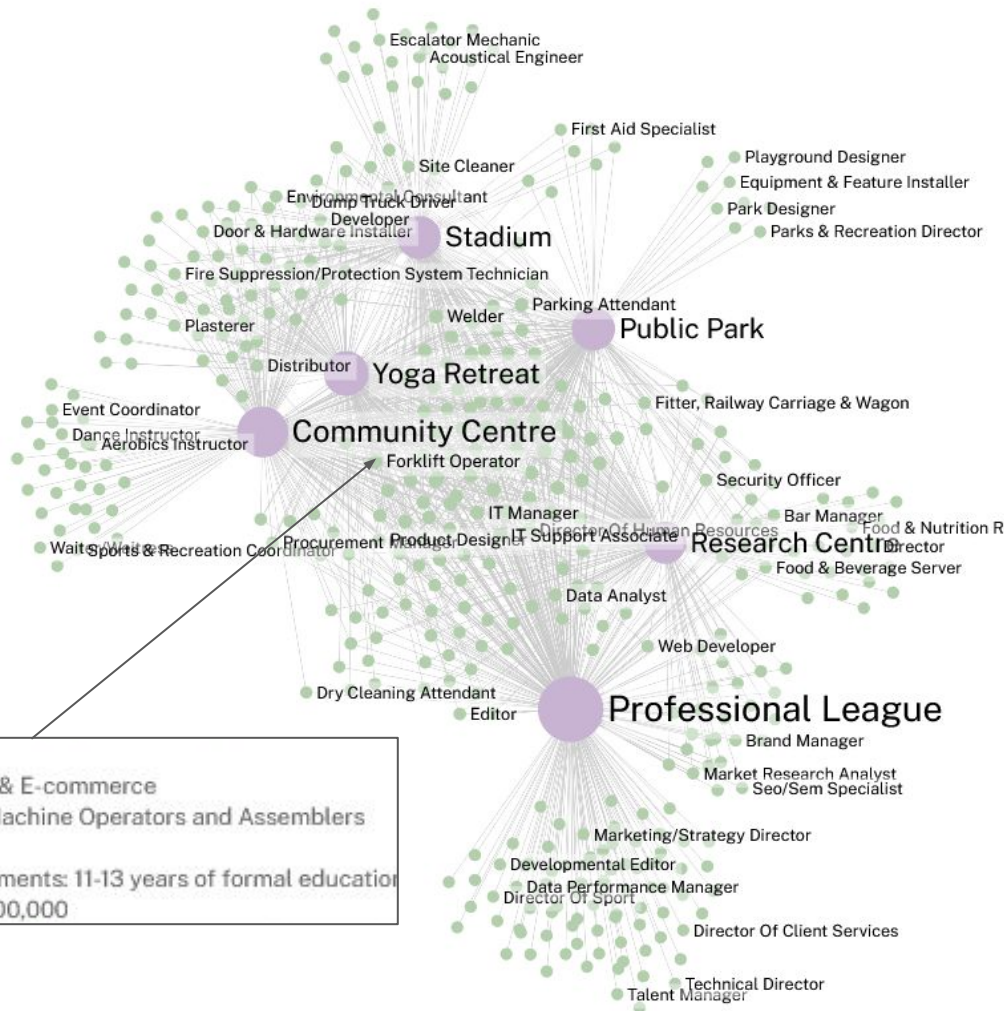
Preliminary Visualisation and Insights

Example: Jobs created by a Stadium

SAPA Jobs Database



SAPA Jobs Database



Forklift Operator

Sub-theme: Online Retail & E-commerce

NCO Division: Plant and Machine Operators and Assemblers

NCO Skill Level: II

NCO Educational Requirements: 11-13 years of formal education

Estimated Salary (INR): 400,000

Jobs created
by a SAPA
ecosystem

Preliminary Insights



Wide range of archetypal occupations:

- Construction, Manufacturing, Tourism, Hospitality and Services, Office Management and Support



Integral role of **unskilled and semi-skilled jobs** for SAPA

- Many “keystone” jobs are in office support or trades
- Phase 1: Identifying which sub-sectors support which jobs
- Phase 2: Mapping skilling programs for keystone jobs



Prevalence of seasonality in trades and white collar occupations due to the periodic nature of competitive sports

- Need to target policy and resources towards permanent jobs created by the recreation and physical activity sector

Identifying Keystone Jobs

The network reveals that some jobs appear more frequently across case studies than others. These “keystone” jobs may require greater government and policy resources and focus.

Top 10 Keystone Jobs (Eigenvector* Score)



Bookkeeper



Software Developer



I.T. Manager



Forklift Operator



Maintenance Technician



Auditor



Accountant



Welder

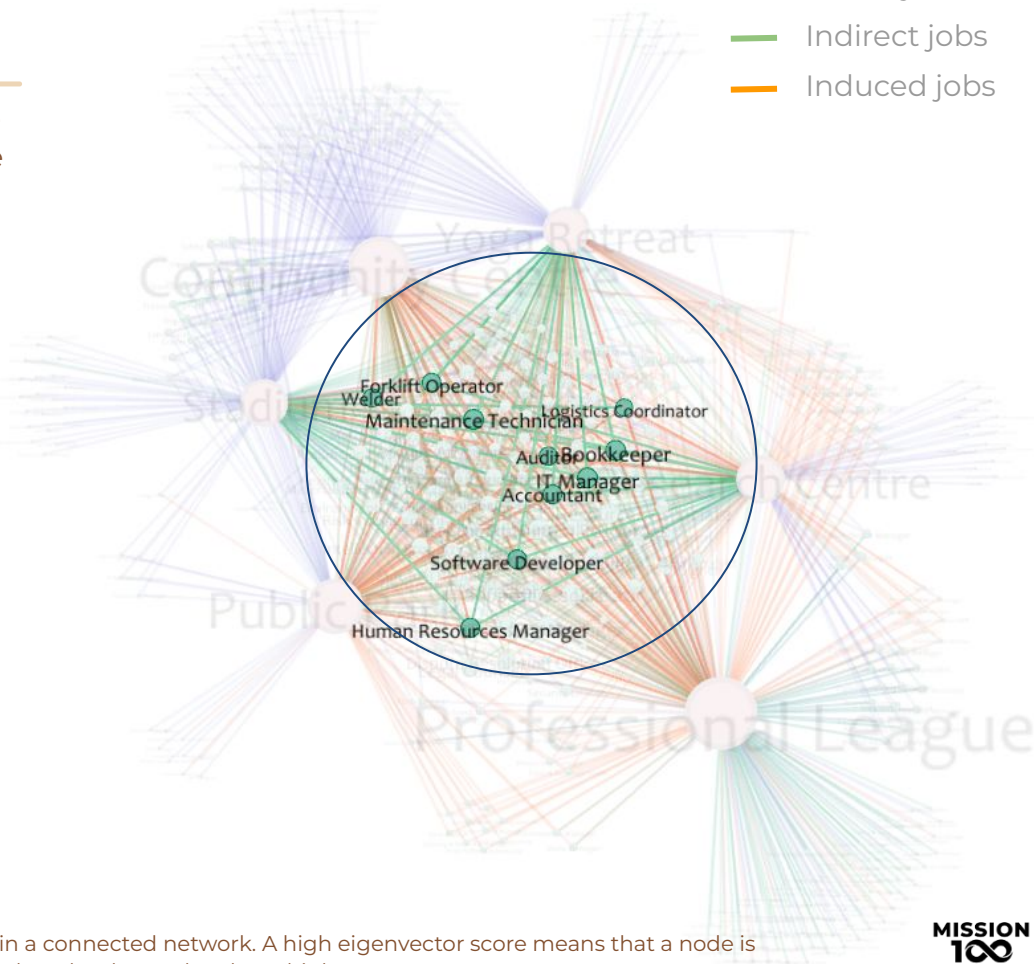


H.R. Manager



Logistics Coordinator

- Direct jobs
- Indirect jobs
- Induced jobs





The Way Forward

Next Steps



Verify estimated salaries for jobs listed in current database and add new cases



Assess and **refine** NCO match confidence



Plug in job creation data from **real cases**

- Quantify and incorporate **multipliers** to realistically estimate no. of jobs in each case



Model **resilience** of SAPA ecosystem to shocks (e.g., COVID-19)

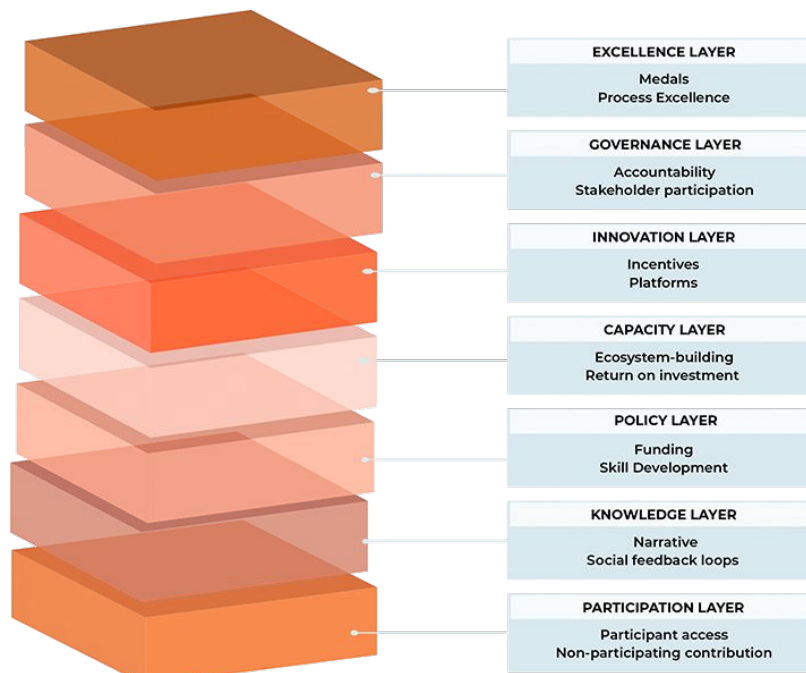
- Better represents SAPA as significant economic sector



Release a web-based **interactive tool** (currently in beta)

A Whole-of-System Approach

As an ecosystem enabler, SSA works to accelerate the growth of the SAPA ecosystem through policy, partnerships, and capacity-building.



SSA's approach, informed by our seven-layered integrated SAPA stack, emphasises governance, capacity, and policy as critical levers for accelerating the SAPA ecosystem.

Job creation occurs across every layer of the SAPA stack from grassroots participation and education to training, infrastructure, science and allied industries. A full-stack approach connects these layers through policy, capacity, and industry to turn SAPA into a sustainable engine of jobs and growth.

About SSA

The Sports and Society Accelerator (SSA) is an independent, not-for-profit National Sports Promotion Organization (NSPO) dedicated to reimagining and rebuilding India's SAPA ecosystem as a lever for national development.



Our Mission

To achieve universal participation in SAPA across India by 2047 - which we call Mission 100 - with every child playing, every Indian active.

Our Approach

Open and collaborative: Engagement with governments, civil society, and enterprises to co-create solutions.

Policy to action: Integration of research, systemic reform, and on-ground implementation.

Ecosystem-building: Emphasis on access, inclusion, physical literacy, and measurable outcomes across education, health, livelihoods, and social development.

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