

Detailed Project Report

Ver 1.0

Sizing Sports Economy Kerala

Sectors, Size, Value & Potential

Sporting, Fitness & Wellness Industry

Vol - II

Submitted To,

KERALA SPORTS DEPARTMENT



KERALA SPORTS SIZING FRAMEWORK

FEBRUARY 2022

Detailed Project Report

Ver 1.0

Sizing Sports Economy Kerala

Sectors, Size, Value & Potential

Sporting, Fitness & Wellness Industry

Vol - II

Submitted To,

KERALA SPORTS DEPARTMENT



KERALA SPORTS SIZING FRAMEWORK

FEBRUARY 2022

TABLE OF CONTENT

1. INTRODUCTION.....	04
2. TARGET.....	05
3. IDEA.....	06
4. PROCESS.....	07
5. RELEVANCE.....	08
6. WHY KERALA - <i>The Economic Point of View</i>	09
7. THE CHINESE SPORTS ECONOMY - <i>A Case Study</i>	10
8. KERALA ECONOMY.....	11
9. SIZING THE SPORTS ECONOMY.....	12
10. SECTOR ANALYSIS.....	13
11. EMPLOYMENT IN SPORT SECTOR.....	39
12. SIZING SPORTS INDUSTRY.....	40
13. IMPACT - <i>Projections (Model)</i>	41
14. OUTPUT.....	42
15. KERALA SPORTS MODEL.....	43

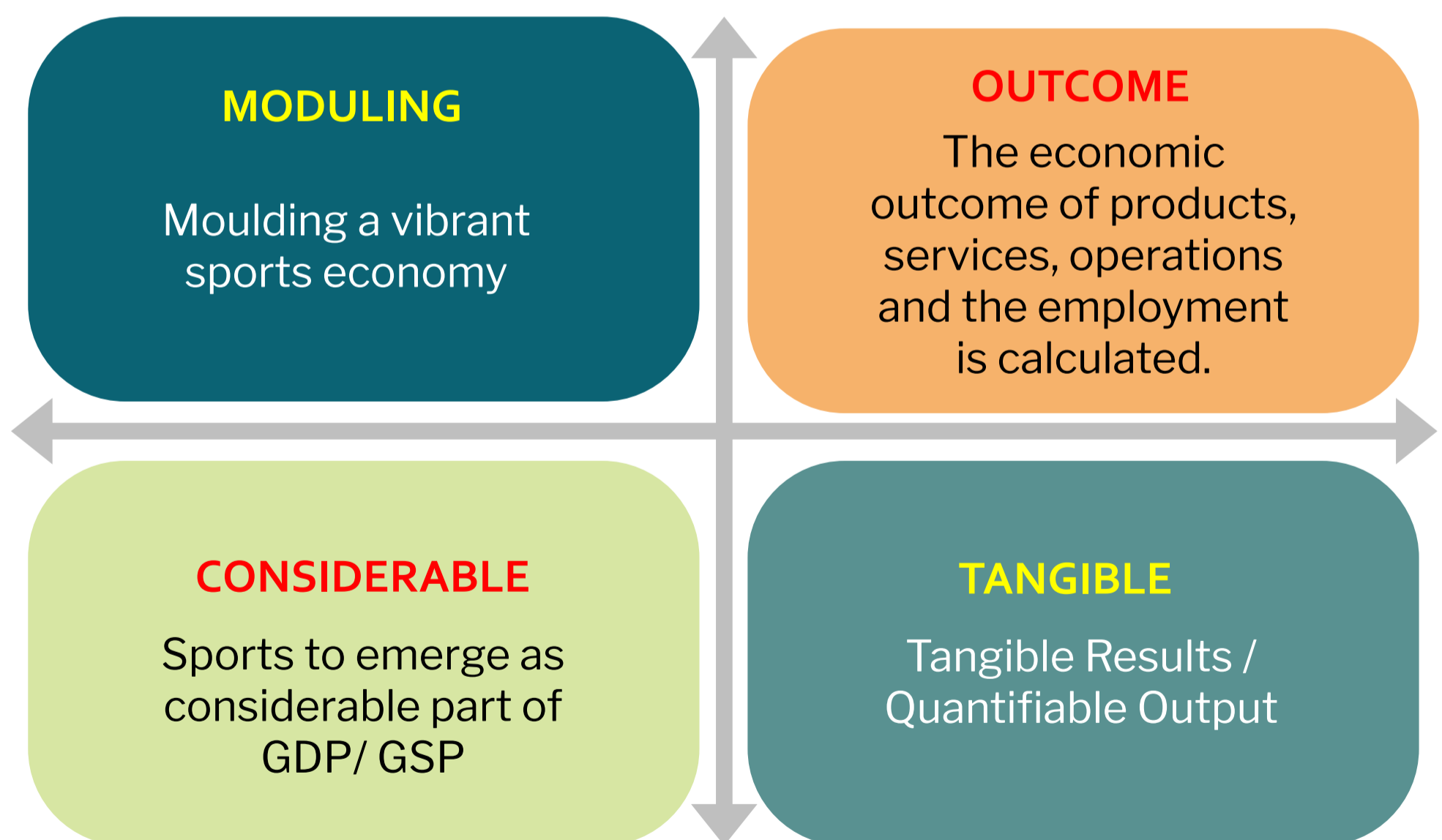
To moulding any economy certain process are required. Sizing the economy is the most important part on it. To quantify an economy data from different level is essential. As Sports is comparatively new area which is emerging as an economy, identifying potential and revenue generating segments and revenue streams are so important. Here we have identified major revenue streams in general. About 25 major sector and its micro segments spotted for this value assessment exercise. 225 micro segments are also identified. These all come under the broader definition of Sports- 'Sports, Fitness, Wellness and Physical Activity Economy'. The non economic outcome is not considered in this study. The employment generation and the GDP conversion of employment is calculated and added to the value.

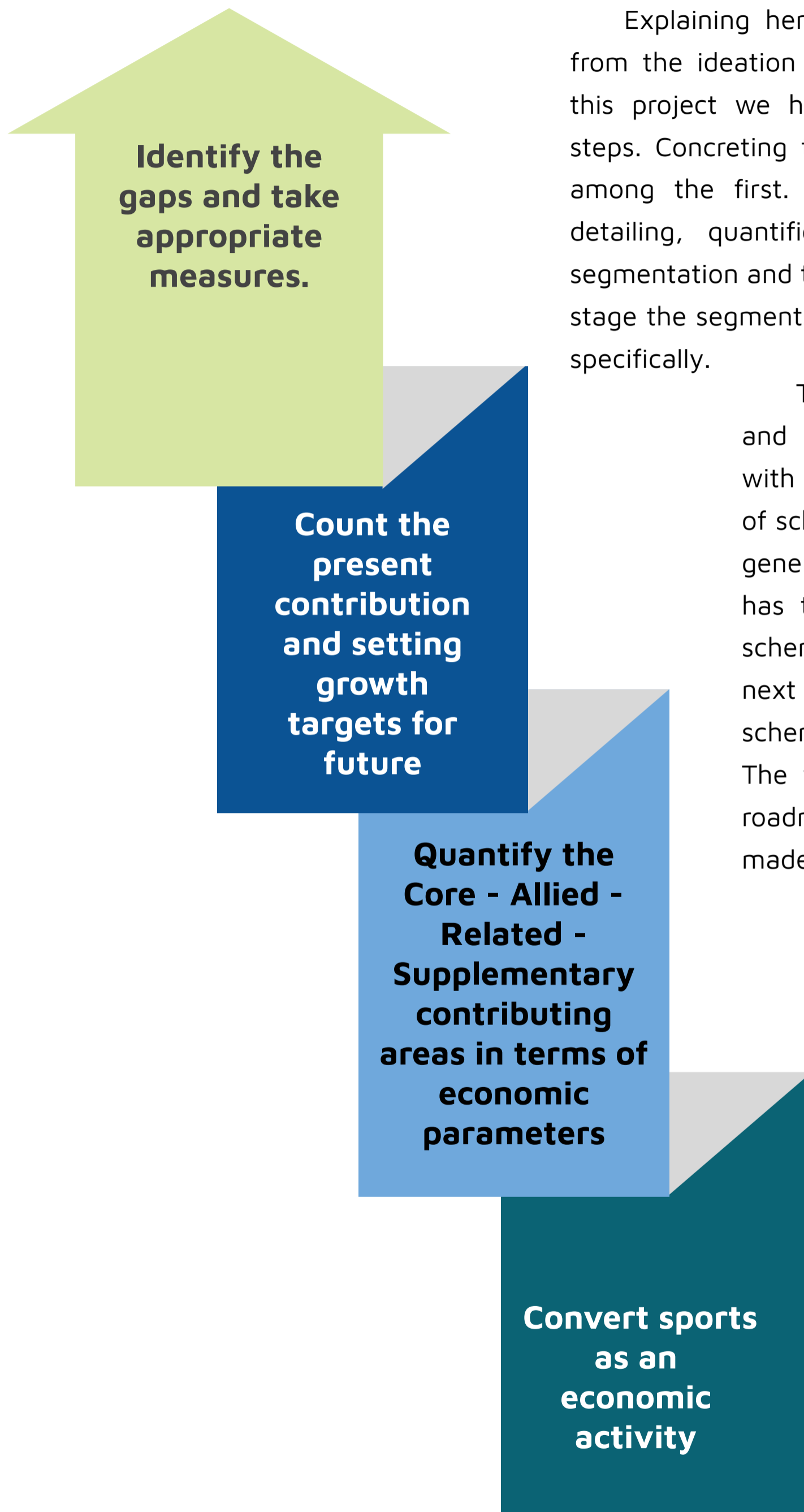
A detailed Sector Spotting ,Identification of thrust areas , Data mining, Modelling, Analysis of models and Case studies are necessary to complete before moving to develop the Sports Economy Prototype.

This is an initial study with the available secondary data and the assumptions are based on the approximate figures.

A detailed micro level assessment through a thorough survey and geographical mapping is suggested to the fulfilment of such an initiative to build an Economy, especially to measure the size.

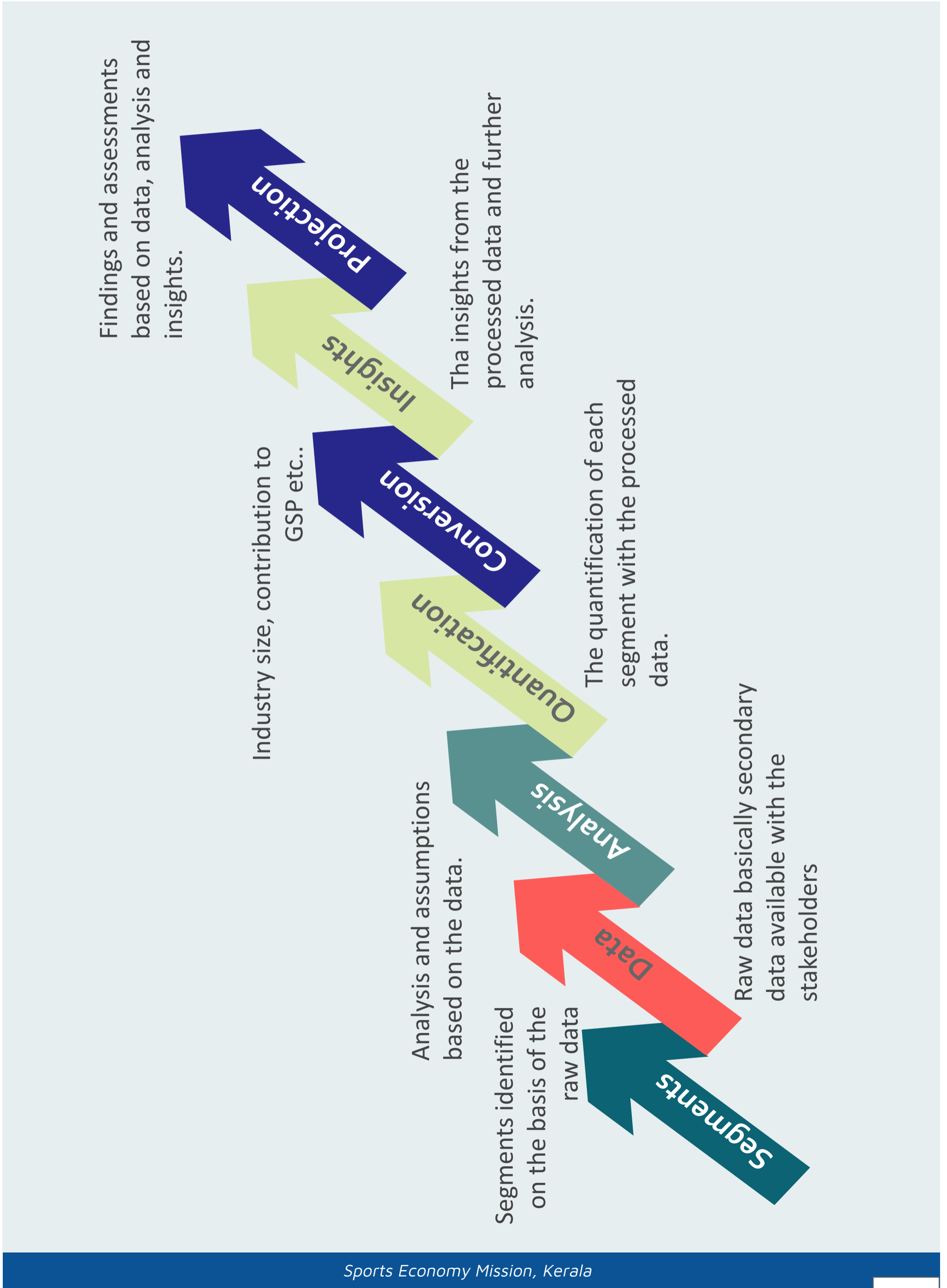
The prime objective of Sports Economy Mission is to quantify the economic outputs and to make a broader calculation of its contribution to GDP. Definition, Segmentation, Data, and analysis of the sector is being done to develop a framework. On the completion of the primary assessment and the corresponding inputs solid projects, programmes and schemes are suggested for a rapid growth of the sector. It is projected and the roadmap is prepared. As mentioned earlier the non economic impact is also important that may be occurred through the new approach. It is essential to quantify it with available or new parameters. Sports Economy Mission is not just completed with the GDP calculations, it is an effort to explore the multi dimensional aspects of Sports through an Industry/ Economy approach. The Mission explore the economic aspects of sports and to increase the core economic outcome of sports and its allies. Here we try to define sports industry and its segments and also trying to mark its boundaries and to seek the possibilities to align few more areas. Fitness, Physical Activities, Wellness and Nutrition, Yoga and Mental Health are more connected with Sports and by giving better focus and thrust on these areas, the canvas of sports can be widened. The sports sector will attain the strength and size required to develop an independent economy.





Explaining here the step to step plans from the ideation to the desired Goals. On this project we have completed few initial steps. Concreting the idea/ concept was the among the first. It was followed by the detailing, quantification/ sizing, projection, segmentation and the analysis. On the present stage the segments are analysed in detail and specifically.

The Sports Economy Sector and its segments are defined with better clarity. A brief plan of schemes in sector wise and in general has been prepared. It has to detail further. Concrete schemes to be evolved in the next phase. The impact of each schemes needed to be assess. The target has to fixed and a roadmap and a timeframe to be made subsequently.



1

INTEGRAL

Sport emerging as integral part of socio-economic development of a country similar to IT, Technology, Agriculture, Tourism etc. Sports is considered as an industry segment globally.

2

MULTI DIMENSIONAL

Multidimensional impact of sports in economy and society. Economical, Social, Health, Preventive, Psychological aspects for Sports in Economy. Even though it cannot be measure fully it is considerable.

3

CORE AREAS

Significant contribution to economic development

- Developing infrastructure
- Generating employment
- Securing capital inflow
- New generation of players.
- Mega sporting events and leagues
- Equipment, Apparel
- Academies, Coaching, Training

4

NEW OPPORTUNITY SECTORS

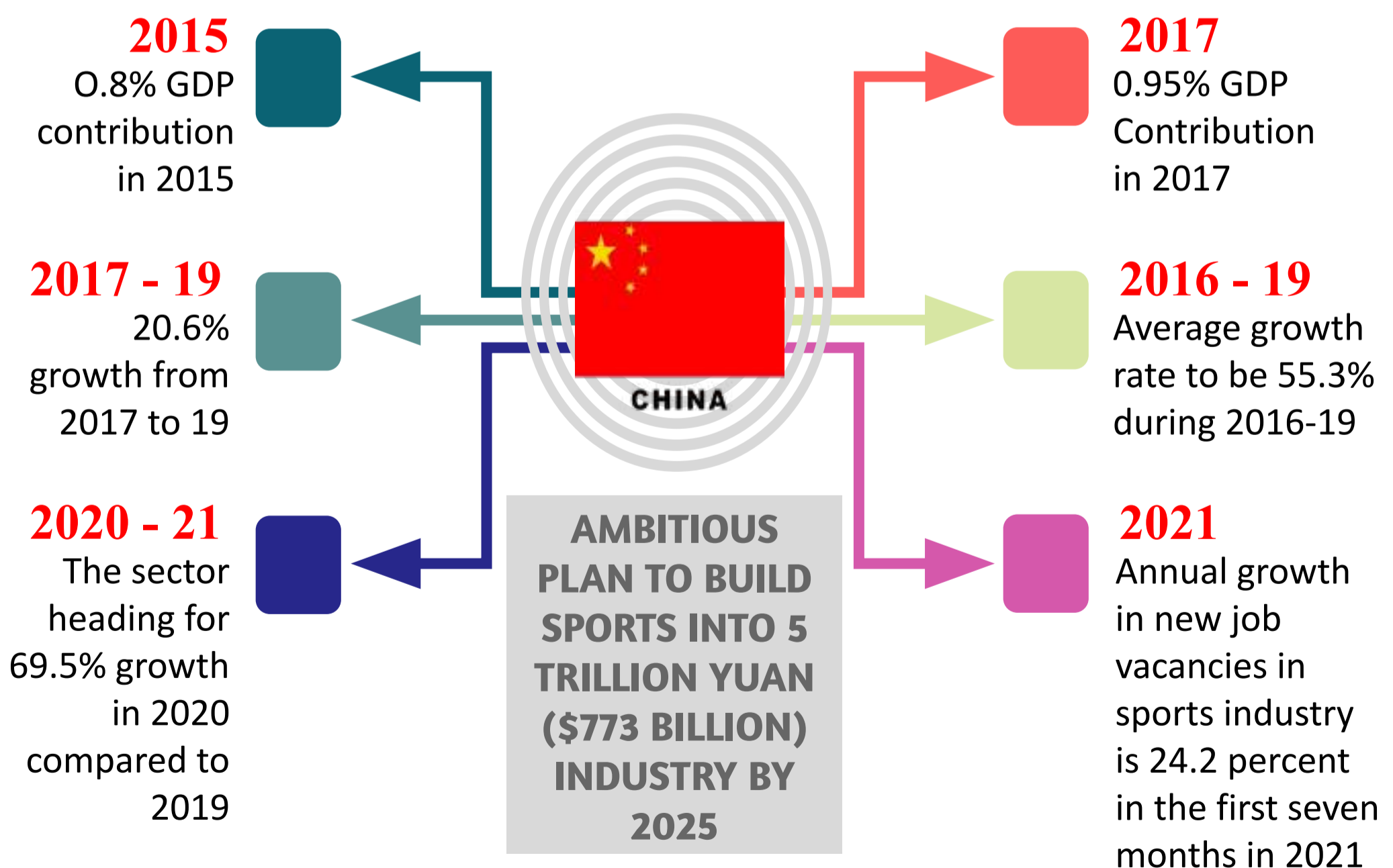
Some major sectors of economy get affected on Covid pandemic. It's essential to find out new opportunity areas of Growth

Kerala has always been a mine of sporting talents that contributed dozens of Olympians for decades. The state contributed numberless national and international players in various sporting events. The state is considered as a recruitment ground of sporting talents to professional clubs, national institutions

- No rural, urban division
- High TV, Smart TV and Mobile density
- Large television and digital consumption
- The budget allocation of MNCs, Corporate and National brands for branding and advertisements for Kerala Market is comparatively high.
- Strong consumerism
- A test market for FMCG, Electronic Gadgets and more
- Emerging entrepreneurial interests
- Startups are seeking new opportunities
- Possibilities of partnerships: Corporate, public sector, co-operative.
- Cooperative is an unexplored area in terms of Sports.
- Potential of developing indigenous sport items such as Boat-race, Tug of war, Sevens football etc with the support of corporate
- Involvement of SME entrepreneurs
- Sports investment has become a viable business proposition in many segments like Turfs, Arenas, Sports Complexes
- Concerns over health and fitness created big opportunities in fitness facilities
- NRI, NRK population is very high and not tapped it well. The non resident keralites are wealthy and many turned to business. They will seek good opportunities in their native.
- Sports has become one among the best branding tool in Kerala as most of the population is sports enthusiast.
- Kerala is a good market for sports goods, MNCs and large corporate have a special interest.
- Sports manufacturing has a potential base in Kerala connected with the Footwear industries in Kozhikkode and Rubber Industries
- Ayurveda has immense potential in Wellness and in Sports medicine
- Tourism will get a peer support from Sports if it develop as an Industry
- The manufacturing and sales of nutrition and wellness products shows a jump

With China poised to top the Olympic gold medals table for the first time since 2008, it's taking even bigger steps to make sports a driver of economic growth. Now authorities have an ambitious plan to make sports into a 5 trillion yuan (\$773 billion) industry by 2025, a 70% increase from 2019 levels. That could make it a potential driver of the economy, a job creator and an attractive area for investment. Shares of Chinese sneaker makers and other sports companies jumped after Beijing set specific goals, like having more than one-third of the population participate in regular exercises, and making sure every county and community has gym equipment. Under the sports plan, more than 3 million people would be employed as fitness trainers to encourage public exercises. That would be more than the number of people that worked in China's hotel and catering sector in 2019. If Beijing's goals are met, sports would account for 3.3% of gross domestic product by 2025 up from 2.5% in 2015.

The Chinese model is a true aspiration for any country which eye for an Economic growth in Sports sector.



The **economy of Kerala** is the 9th largest in India, with an annual Gross State Product (GSP) of ₹9.78 lakh crore (US\$138.88 billion) in 2020–2021. Per-capita GSP of Kerala during the same period is ₹205,484 (US\$2,917.97), the sixth largest in India. In 2019–20, the tertiary sector contributed around 63% of the state's GSVA, compared to 28% by secondary sector, and 8% by primary sector. Kerala, which accounts for 2.8% of India's population and 1.2% of its land area, contributes more than 4% to the GDP of India. Thus, the southern states per capita income is 60% higher than India's average.

The state's service sector which accounts for around 65% of its revenue is mainly based upon its Hospitality industry, Tourism, Ayurveda & Medical Services, Pilgrimage, Information technology, Transportation, Financial sector, and Education. Kerala is an established tourist destination for both Indians and non-Indians alike. Tourism contributes to nearly 10% of the state's GDP. Around 18% of the total employees in the organised sector of state, both public and private, are employed in the Educational sector as in March. Agricultural sector contributes only 7% to the GSDP of Kerala.

Kerala, which accounts for 2.8% of India's population and 1.2% of its land area, contributes more than 4% to the GDP of India. Thus, the southern states per capita income is 60% higher than India's average. This has fuelled internal migration to Kerala for low-end jobs, even as Keralites have emigrated—mostly to the Gulf countries—in search of better-paying jobs. Around 3,000,000 Keralites are working abroad, mainly in Persian Gulf; to where migration started with the Gulf Boom. The Kerala Economy is therefore largely dependent on trade in services and resulted remittances. In 2012, the state was the highest receiver of overall remittances to India which stood at Rs. 49,965 Crore (31.2% of the State's GDP), followed by Tamil Nadu, Punjab and Uttar Pradesh. The Migrant labourers in Kerala are a significant workforce in industrial and agricultural sectors of state. Kerala's economy was gradually shifting from an agrarian economy into a service-based one during the period between 1960 and 2020.

It's a long process to measure the size of any industry and its contribution to general economy. All industries are generally spread out with different major segments and micro areas. The economic activities and revenue streams of each micro segments to be considered. Sports is an industry with multi dimensional aspects vary from Sporting to Wellness.

25 Major segments and 225 micro areas are identified in the Sports Industry. Primary data is not available in the majority of the sectors. The quantification process has been done on depending secondary data.

A detailed ground level survey is needed to grab the primary data from various levels. This is essential not only to quantify but also to identify the gaps to fill and set a target to grow.

THE SECTORS

These 25 Major segments are identified on the basis of the current sporting scenario and the potential of growth. This selection is purely on the aspects of revenue generation possibilities. Few sectors are not generating any revenue at present but it is included by considering the scope in future; also considering the global and national scenario.

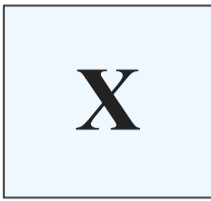
1. *Sports Infrastructure- Construction, Maintenance*
2. *Fitness Infrastructure*
3. *Sports Equipment- Manufacturing*
4. *Sports Equipment- Retailing*
5. *Events- Championships, Leagues*
6. *Coaching & Training*
7. *Sports Education, Management, Engineering & Media*
8. *Sporting Clubs*
9. *Sports Medicine*
10. *Fantasy Games*
11. *Media- TV, Digital & Print*
12. *Startups*
13. *Nutrition, Wellness*
14. *High Value Sports*
15. *Adventure Sports*
16. *Non Conventional Sports*

17. *School, College Sports*
18. *Sports Operations*
19. *Allied Services- Complementary Sectors*
20. *Sports Technology and Science*
21. *Indigenous Sports*
22. *Sports Tourism*
23. *Sports Branding, Marketing*
24. *Fitness and Sports based public amenities*
25. *Services, Facilitation*

THE REVENUE STREAMS

These are the supportive streams that contribute revenue in the sports economy.

1. Sporting
2. Rental
3. Investments
4. Recreation
5. Membership
6. Sponsorship
7. Branding
8. Contributions
9. Remuneration
10. Ticket Sales
11. Consumption
12. Govt Grants
13. Investments
14. Services
15. Sales



We have identified 25 major segments and 207 micro segments related with Core, Allied, Complementary and Supplementary activities which are either directly contributing or with the potential to contribute.

We have conducted a study with the secondary data to quantify each segment and its micro areas.

Focus- To achieve the growth in each segment, it is necessary to chalk out a perfect roadmap for every micro segment.

Plan- Projects, Schemes and Programmes for each segment is necessary

Connect- It shall connect and match with the Policy framework and General Guidelines of the State Government

SPORTS INFRASTRUCTURE

Sports infrastructure is the most significant contributor in the Sports Economy perspective. Its included Multi Purpose Stadium, International Stadiums, Stadiums in different standards and levels, Sports complexes, Aquatic Complexes etc. Majority of them are Govt. owned and managed. Modern Turfs and Arenas has become a game changer. It came up with the entrepreneurial aspiration and the passion of youth to play across the State. The private sector investments has increased in the avenues like Sports Complexes, Turfs, Academies etc. Trusts, Social Organisations, Social Clubs also came up with these types of facilities. Govt still continue huge investments in Centers of Excellence for Sports infrastructure. We have Golf Course like high value sports facilities and modern sports amenities. The new infrastructure will be a boost for the construction industry at large. When sports infrastructure improves, more events will be taken place. It increases the demand of temporary facilities and providers like Galleries, Flood Light so on. Education institutions are building up good infrastructure like Turfs, Wooden Courts, Aquatic Complexes, Tennis Courts and Net practicing facilities. Direct sporting income, venue rental, facilities rental, training, construction, facilities, purchases, recreation etc. generate revenue and the sector contribute substantially to Sports Economy.

SPORTS INFRASTRUCTURE - MICRO SEGMENTS

<i>Large Stadiums</i>	<i>Medium Stadiums</i>	<i>Mini Stadiums</i>
<i>Sporting Turfs and Arenas</i>	<i>Sports Complexes</i>	<i>Indoor Courts</i>
<i>Synthetic Tracks</i>	<i>School, College Grounds</i>	<i>Cricket Pitches</i>
<i>Volleyball Courts</i>	<i>Basketball Courts</i>	<i>Aquatic/ Swimming facilities</i>
<i>Badminton Courts</i>	<i>Golf courses</i>	<i>Net practice Centers</i>
<i>Construction and Facilitation</i>	<i>Tennis Courts</i>	<i>Temporary Facilities</i>
<i>Throw, Jumping Pits</i>	<i>Billiards, Snooker Boards</i>	<i>Grounds owned by local bodies</i>
<i>Rural small grouClay/ Mud courts - Football</i>		

SPORTS INFRASTRUCTURE - SIZING ATTRIBUTION

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)													Total		
			Sporting	Recreation	Rental	Investments	Membershi p	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Sevices	Sales			
Sports Infrastructure	Large Stadiums	4	0.25	0.25	10													10.5
	Medium Stadiums	26	0.25	0.25	3													3.5
	Mini Stadiums	100	0.25	0.25	1													1.5
	Sports Complexes	12	5	3	3	3	1											16
	Sporting Turfs and Arenas	900	450		100			10										560
	Indoor Courts	200	40	2		10												53
	Synthetic Tracks	13																0
	Throw, Jumping Pits	25																0
	Aquatic/ Swimming facilities	100	10				10											20
	Golfcourse	4	1				2											3
	Clay/ Mud courts - Football	1600		50														52
	Cricket Pitches	1000		50														
	Volleyball Courts	400		5														5.25
	Basketball Courts	100		2														2.1
	Tennis Courts	50		10														10
	Badminton Courts	1800		70			25											95
	Construction and Facilitation	100				1000												1000
	Temporary Facilities	100		3														53
	Net practice Centers	200		2														2
	Billiards, Snooker Boards	50					1											2
School, College Grounds	2000				150												160	
Rural small grounds	3000		300														300	
Grounds owned by local bodies	500				55												55	
Grand total																2403.85		

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

FITNESS INFRASTRUCTURE

Fitness infrastructure is well defined and a fast developing sector in Sports related industry. It's an unorganised sector and widely spread across the state. Individual entrepreneurs and large corporates are present in the sector. Investment on an average fitness center is considerably big in size and interim investments and proper services are also needed. It is expected that the segment will grow in rapid pace because of public concern over health due to Covid related situations. The number of yoga centres are also increasing with the new lifestyle aspirations. Yoga practices are now considered as a sporting item and the central sports ministry has formulated the guidelines. It's also a boost to the segment. Women are getting more engaged in fitness activities. Local bodies are developing Smart walkways and Cycling tracks. Better fitness infrastructure and awareness leads to a big requirement of fitness equipment, apparel, footwear etc. The income comes through membership, usage etc. The economic activities are spread through multifacet activities including purchase of fitness equipment and so on.

FITNESS INFRASTRUCTURE - MICRO SEGMENTS

1. *Gymnasiums*
2. *Fitness Centers*
3. *Yoga Centers*
4. *Walkways*
5. *Cycling Tracks*
6. *Home Gymnasiums*

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)			
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales	
Fitness Infrastructure	Gymnasiums	800	160				10										170
	Fitness Centers	100	10			40											50
	Yoga Centers	280				28											28
	Walkways	50															0
	Cycling Tracks	10			1										0.5		1.5
	Home Gymnasiums	2000															0
		Grand total															249.5

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS EQUIPMENT MANUFACTURING

Sporting equipment, also called **sporting goods**, are the tools, materials, apparel, and gear used to compete in a sport and varies depending on the sport. The equipment ranges from balls, nets, and protective gear like helmets. Kozhikode has become a major hub for footwear manufacturing in South India. Paragon, VKC, Odyssia like footwear majors rises and other SMEs emerging. Major companies are now focusing on Sports shoes, Jogging shoes, Running shoes etc. Now Government of Kerala is setting up a Sports manufacturing park/ hub/ cluster at Kozhikode. Sports equipment manufacturing will be a rising sector for Kerala as the state is a huge consumer market. Also the availability of raw material is high especially Rubber and the components used for footwear manufacturing. Rubber is a great material input for sports equipment manufacturing. More researches needed in the segment, but the Rubber manuel identified hundreds of products. We can replace many popular products with rubber as their basic component. Huge potential for export too. As kerala is a large producer of natural rubber, immense potential for rubber based sports goods.

We have a tennis manufacturing company is at Kannur. The Jabulani footballs, which was used in World manufactured used latex from Kerala.

SPORTS EQUIPMENT MANUFACTURING- MICRO SEGMENTS

1. Jersey & Track Suit
2. Apparel
3. Fitness Equipments
4. Basic play equipment
5. Footwear
6. Raw material
7. Wooden Court
8. Balls
9. Trophies, Souvenirs
Green, Synthetic, Mud Turfs

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)						
			Sporting	Recreation	Renta	Investment	Membershi	Sponsorships	Salary	Contribution	Ticket Sales	Consumptio	Govt. Grants		Sevices	Sales				
Sports Equipment- Manufacturing	Jersey/ Track Suit																	50	50	
	Apparel																	50	50	
	Footwear																	50	50	
	Balls																	3	3	
	Basic play equipment																	2	2	
	Raw material																	25	25	
	Trophies, Souvenirs																	50	50	
	Fitness Equipments																	10	10	
	Green, Synthetic, Mud Turfs																		6	6
	Wooden Court																		4	4
Grand total																			250	

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS EQUIPMENT RETAILING

Sports Equipment retailing is an emerging sector in Sports. Major multinational players like Decathlon have started Sports malls like big retail shops in cities and have a plan for fast widening in the state. Domestic players with multiple shops are also expanding. All major towns have one or more exclusive sports shops. Big supermarkets to small retail shops have sports goods in their product line. Fitness equipment dealt with exclusive shops are also available in sports shops and in general stores. Basically Kerala is a consumer state and demand is increasing in sports goods and sports lifestyle products. It will further increase with the improvement in Infrastructure, events, avenues and the level of aspiration. When more people get involved in Sports the demand will increase naturally.

SPORTS EQUIPMENT RETAILING - MICRO SEGMENTS

1. Exclusive Stores- Large
2. General Stores & Sales
3. Exclusive Stores- Medium
4. Fitness Equipment retail
5. Exclusive Shops- Mini
6. Toys & Playthings

Sectors		Sizing Sports Economy													Total (Cr.)		
		Attribution of Sports Economy															
Sports Equipments-Retailing		Micro Segments	Quantity	Income from different heads (All Counts in Crores)										Grand total			
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption		Govt. Grants	Services	Sales
		Exclusive Shops- Large	10													50	50
		Exclusive Shops- Medium	35													50	50
		Exclusive Shops- Mini	750													375	375
		General Sales	25000													500	500
		Fitness Equipment retail	10000													500	500
		Sports Cycles														5	5
		Sporting Bykes														5	5
																	1485

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS EVENTS

The list of sporting events in the state starts from the ISL home matches of Blasters. It's a classical example for the potential of large sporting events. It generate revenue and become a strong economic activity in multiple aspects. GCDA the owner of the property is getting rental income. Huge income generated from the Gate collections of spectators. Each matches has generate telecast revenue. Direct and indirect sponsorships are there. The revenue is distributed to Team, Players, Associations and League Owners. Tax income goes to Government and Local body. Temporary service providers like food, Digital boards, flex suppliers are also benefited. Lot of temporary jobs will be created. Printers, media like service providers get opportunities.

The sporting events in the state are in different levels and standards. If we consider it altogether the volume of business, economic activation, revenue generation, employment opportunities, service activities etc are very high. The indogenous items and rural events attract huge spectators. If it promote well it will be a gamechanger. Sevens Football, Tug of War and Boat race are attracting massive crowd. When it become a screen product the viewers will be multiplied.

The results of the League which was developed in Boat Race was amazing. The economy of the Boat race starts from the Snake boat construction and maintenance of old ones. Months long preparations and trainings follows. The race is a big celebration of each areas. The local people and families are spending large amount for it. They are considering it as a pride of their region. The Boat League and the competing clubs are getting huge sponsorships from the corporate.

SPORTS EVENTS- MICRO SEGMENTS

1. National Events
2. District level Events
3. State Level Events
4. State Leagues
5. District Leagues
6. Corporate Leagues
7. School, College- Special
8. School, College- General
9. Indegenous Sports
10. Rural sports
11. Institution & Organisation

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)									
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales							
Sporting Events	National Events					1					5											11	
	State Leagues				1					1													3
	State Level Events				1					1													3
	District Leagues				0.5																		0.5
	District level Events																						0
	Corporate Leagues				0.5					1													1.5
	Rural sports									25			10		2								37
	Indegenous Sports									10					5								15
	School, College- General																					47	50
	School, College- Special																					4	5
	Institution & Organisation																					5	8
Grand total																							134

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS COACHING & TRAINING

Coaching is very prominent sector in Sports. Major sports Giants are spending large amount in Coaching, Academies, Trainers Training etc. We have Sports academies in various levels and standards.

SEPT, a sports initiative from Kozhikode is running about 60 Football academies in the State. LIFFA has more than 30 Soccer nurseries in Thiruvananthapuram district itself. Blasters started 5 plus soccer nurseries.

We have sports academies and training facilities in all major sporting avenues. Among them few are Govt funded. Many former players also come up with good academies. Usha School has excellent infrastructure and facilities.

Many Schools have excellent training facilities and quality coaches. Even Though there is a lack in Trainers Training.

COACHING & TRAINING- MICRO SEGMENTS

1. Premium Academies
2. Medium Academies
3. Rural Academies
4. Sports Schools
5. Teachers Training
6. Coaches Training
7. Short term Trainings
8. School, College- General
9. School, College- Specialised
10. Research Centers
11. Sports Science
12. Sports Management Studies

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)													Total (Cr.)										
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services	Sales											
Training	Premium Academies	100					2	2					3											9		
	Medium Academies	250					3	1					1												7	
	Rural Academies	1300					2	2					2												8	
	Sports Schools												1												3	
	Teachers Training																								2	
	Coaches Training																								1	
	Short term Trainings																								0	
	Sports Management																								0	
	School, College- General																									8
	School, College- Specialised																									8
																										46

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS EDUCATION & CAREER

Sports Education & Career

1. Sports Management
2. Sports Agent
3. Sports League Manager
4. Tournament Manager
5. Sports Club Manager
6. Sports Director
7. Sports Merchandiser
8. Sports PR Officer
9. Sports Accounts Manager
10. Sports Event Coordinator
11. Sports Facility Manager
12. Advertising Manager
13. Sports Development Officer
14. Sports Official
15. Professional Scout
16. Sports Analyst
17. Player Liaison Officer
18. Event Manager/ Coordinator

Sports Engineering

1. Materials Engineer
2. Manufacturing Systems Engineer
3. Industrial/ Product Designer
4. Motorsports Engineer
5. Equipment Manager/Engineer
6. Pitch/Ground Curator

Sports Science

1. Biomechanist
2. Sports Dietitian/ Nutritionist
3. Sports Therapist
4. Sports Psychologist
5. Sports Analyst
6. Sports Application Developers
7. Sports Programmers
8. Video Analyst

Sports Media

1. Broadcasting Engineer/ Technician
2. Sports Photographer/
Videographer
3. Sports Commentator
4. Sports Journalist
5. Sports Anchors/ Presenters
6. Video Editor
7. Online Editors
8. Graphic Designers
9. Virtual studio operator

CLUBS

The clubs both Professional and Ametuer have a crucial role in the development of Sports. We have a shortfall in departmental clubs which was very strong earlier. Kerala Police, KSRTC, Titanium, FACT etc managed well equipped clubs in different sporting items. KSEB has good clubs in Volleyball and in Basketball in Women sector now. They have contributed excellent international players in the last decade.

We don't have enough professional clubs while considering the potential of the state. Blasters, Gokulam FC etc are exemptions. Gokulam manages both Men and Women teams and won the I League in both items.

CLUBS- MICRO SEGMENTS

1. Professional
2. Registred
3. Ametuer
4. School, College
5. Departmental
6. Institution, Organisation
7. Recreational

(Clubs are in different discipline of sports shall be considered from Football to Athletics)

Sectors		Micro Segments	Quantity	Income from different heads (All Counts in Crores)												Total (Cr.)			
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Sevices		Sales		
Clubs		Professional					30				15							45	
		Registred				3				3									6
		Ametuer				1				2									3
		School, College																	0
		Institution & Organisation				2													2
		Recreational				2				1									3
		Departmental				5										2			7
Grand total																66			

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS MEDICINE

As sporting activities increases the needs are the requirement of Medicine and Healthcare will also increases. Kerala has good healthcare infrastructure basically and only few additions needed to set up Sports medicine departments in any hospitals. Few hospital started specialised centers of Sports Medicine to grab the opportunities.

Ayurveda has immense potential in this sector. It's truly untapped. Ayurveda can provide exclusive treatment procedures and excellent wellness solutions. Naturopathy also have the similar features to extent unique services.

SPORTS MEDICINE- MICRO SEGMENTS

1. Specialised Hospitals
2. Ayurveda
3. General Hospitals
4. Yoga
5. Naturopathy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)												Total (Cr.)		
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services		Sales	
Sports Medicine	Specialised Hospitals															5	5
	Ayurveda															3	3
	General Hospitals															5	5
	Yoga															0.5	0.5
	Naturopathy															0.25	0.25
		Grand total															13.75

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS OPERATIONS

Sports operations including logistics, labour, Management, Administration is a sizable area in Sports economy. Its essential in managing Sports infrastructure, Events, Academies, Clubs, Equipment manufacturing so on. When Sports economy emerge the operations will naturally improve. It will generate more employment and enterprises. Sports operations can be considered as an integral part of Sports Management.

SPORTS OPERATIONS- MICRO SEGMENTS

1. Logistics
2. Labour
3. Management
4. Administrative
5. Recreation

Sizing Sports Economy																
Attribution of Sports Economy																
Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)		
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales
Sports Operations	Logistics														25	25
	Labour														50	50
	Management														5	5
	Administrative														2	2
	Recreation														10	10
Grand total																92

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS COUNCILS, DIRECTORATE & ASSOCIATIONS

Sports Directorate and Sports Council are Government funded and associations are getting grants from their corresponding National Associations. Government is spending huge amount every year to manage the infrastructure and facilities. Kerala Cricket Association is getting huge funds from the cash rich BCCI and they are building good Stadiums, Academies, Training facilities and conducting tournaments. All other associations are heavily depends on Sports council grants. Kerala Football Association has long term tie ups with corporate. Other associations running shortage of funds. They are not even trying to stand self sustained. Its high time to equip Associations to run independently without govt grants.

SPORTS COUNCILS, DIRECTORATES & ASSOCIATIONS - MICRO SEGMENTS

1. Sports Directorate
2. Kerala Sports Foundation
3. State Sports Council
4. District Sports Councils
5. Sports Council at Panchayath
6. Kerala Cricket Association
7. Kerala Football Association
8. Other State Level Associations
9. District Level Associations

Sizing Sports Economy		Attribution of Sports Economy																
Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)										Total (Cr.)					
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption		Govt. Grants	Services	Sales		
Sports Council & Associations - Sports Management	Sports Directorate																	200
	State Sports Council																	0
	Kerala Sports Foundation																	0
	District Sports Councils																	0
	Sports Council at Panchayaths																	0
	Kerala Cricket Association										25							25
	Kerala Football Association																	0
	Other State Level Associations																	0
	Distric Level Associations																	0
																		225

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

ALLIED SERVICES - COMPLIMENTARY SECTOR

Even though its allied/ complementary sector its a big economic activity. The major role of this sector come up with events. The ISL matches can be considered for a case study. A single match benefits to Restaurants, Hotels, Taxi, Auto, Traders so on. Temporary/ Street vendors also get benefitted.

It's essential to create more Leagues, National and International Events to develop the economy. Also needed to scaleup the local and indogenous sporting events by connecting it to Tourism.

ALLIED SERVICES - MICRO SEGMENTS

1. *Stay, Accommodation*
2. *Food- Restaurants*
3. *Travel*
4. *Trade*

		Income from different heads (All Counts in Crores)											Total (Cr.)			
Sectors	Micro Segments	Quantity	Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services	Sales	
Allied Services	Stay, Accommodation													100		100
	Food- Restaurants													100		100
	Travel													100		100
	Trade														25	25
Grand total																325

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS TECHNOLOGY & SCIENCE

Sports is Science at all now. Developed countries managing sports with most modern technologies, analytics tools and applications. Its the reason behind their massive growth and achievements in Olympics and in World championships. Its essential in Skill development, team buildup so on. India's tech hub Bangalore is running far ahead with the support of Technology. Lot of companies engaged in creating Tech solutions specifically for sports operations. Sporting Institutions are now focusing more on researches.

In Kerala, the Sports technology and Science is in budding stage. We have needed more focus and attention. Psychology and related training has a critical role in moulding talent and achieve peak performance levels.

The role of Startups are here. Immense potential lies on it. New avenues of Enterprises and openings of Job are here.

SPORTS TECHNOLOGY & SCIENCE - MICRO SEGMENTS

1. *High Value Equipments*
2. *Researches*
3. *Visual Analysis*
4. *Analytical Programming*
5. *Applications*
6. *Psychology and Mental Health*

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)										Total (Cr.)				
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption		Govt. Grants	Sevices	Sales	
Sports Technology & Science	High Value Equipments																2
	Researches																1
	Visual Analysis																2
	Analytical Programming															0.5	0.5
	Psychology & Mental Health																0
	Applications																0
Grand total													5.5				

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

FANTASY GAMES

The Central Government has developed a framework and guideline for Fantasy Games. It is expected a rapid growth in the segment. Youngsters and Kids engaged more with Fantasy Games. Online Fantasy Games has become more common in the last 2 decades and shockingly it has secured top gear in India. Because, if by creating your own imaginary team, you could earn some real money.

Dream 11, Halaplay, MPL- Mobile Premier League, Cricplay, Fanfight, 11 Wickets.com, Zapak, BalleBaazi, MyTeam11 and Rummy Circle are the major players in India.

Kerala has not a big role in the Gaming business, but the consumption is huge. Youngsters are getting substantial good amount while playing this crazy games on online.

Further huge growth is expected in this sector in near future.

FANTASY GAMES- MICRO SEGMENTS

1. Platforms
2. Applications
3. Development
4. Consumption

		Income from different heads (All Counts in Crores)											Total (Cr.)			
Sectors	Micro Segments	Quantity	Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services	Sales	
Fantasy Games	Platforms											1		0.5		1.5
	Applications											5		0.25		5.25
	Development													0.25		0.25
	Consumption											0.25				0.25
Grand total																7.25

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

MEDIA

Sports is now basically a media product. The events has become Screen products. The Television revolutionised sporting industry. Now the digital space increases its intensity. The Statistics shows the spectators of popular sporting items through Television Channels are 100 times more than those who watches in Stadium. The Major chunk of the revenue of any sporting event comes from the Television rights. The Channels are generating revenue from Advertisements and Subscription charges. When compare with the revenue from the Ticket sales we can see huge difference. Now the organisers are selling digital rights too and generate big revenue.

Now the game is not in the ground, but in the Screen. Sports Telecasting industry itself is big in size. Channels now started providing content in local languages too. The consumption of Sports content in Kerala is very high and far ahead of National average. News Papers also have at least a dedicated page coverage for sports globally. Sports magazines are best sellers even now.

The media is a great employment generator in Sports especially in Television. The requirement of Creative and Technical people are increasing.

MEDIA - MICRO SEGMENTS

1. TV Broadcast
2. Print Media
3. Digital & Social Media
4. Freelancing
5. Technology- VR, AR
6. Film

		Income from different heads (All Counts in Crores)											Total (Cr.)		
		Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services	Sales	
Media	TV Broadcast						50				250		50		350
	Traditional Media						25				200		50		275
	Digital & Social Media						25				100		10		135
	Freelancing												10		10
	Technology- VR, AR														0
	Cinema														0
Grand total															770

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

INDEGENOUS SPORTS

In football we have a special product - Sevens plays all around the state with massive crowd supports. At least 100 major and around 300 small tournaments are taking place every year. The Sevens originated in Kerala and is deep rooted. Foreign players are there in the Sevens Clubs. There were some efforts to professionalize it by bringing a League for Sevens Football. Now its playing in Goa, Tamil Nadu, Bengal, Mumbai and North East. Sevens is playing in highly malayali populated Middle East too.

Boat Race is another major indegenous sporting item very popular in Kerala. Its attracting foreign spectators too. The Boat League was started 3 years back with Television telecast and Branding support. It was created great impact and shows potential of further growth like Pro Kabaddi League. .

Tug of War is another major local item widely plays in the state. Around 100 tournaments are taking place every year with large people participation

INDEGENOUS SPORTS - MICRO SEGMENTS

1. Events
2. Clubs
3. Training
4. Temporary Infrastructure
5. Sevens, Boat Race, Tug of War, Water Sports

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)										Total (Cr.)					
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption		Govt. Grants	Services	Sales		
Indigenous Sports	Events																	0
	Clubs				2	2												4
	Infrastructure				2	5		2										9
	Temporary Infrastructure				2	5		2										9
	Sevens, Boat Race, Tug of War, Water Sports																	0
																		22
																		22

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS TOURISM

When the indigenous sporting items and events become professional there will be an opportunity to tap the potential of Tourism. The boat race has proved its strength of attracting foreign and domestic Tourists.

Sevens also has the similar potential as it originated and rooted in Kerala. The procedures and the event flow is absolutely local favoured. But we haven't market it yet. Tug of War is also very popular and a potential of Tourism related growth.

SPORTS TOURISM- MICRO SEGMENTS

1. Events
2. Avenues
3. Archives
4. Ayurveda
5. Watersports

Sectors		Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)				
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales		
Sports Tourism		Events																0	
		Avenues																	0
		Archives																	0
		Ayurveda																2	2
		Water Sports																	0
Grand total															2				

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

STARTUPS

The participation of new entrepreneurs, ventures and startups are essential for the development of any industry. The Startup ecosystem is in the budding stage in India. In Bangalore lot of startups are emerging in multiple streams of Sports. Fantasy sports initiatives has become super startups. Sports Infrastructure, Facilitation, Training, Networking, Media, Digital transformation, Science, Equipment, Online sales etc are most prominent areas having the potential for the startups to grow.

Its high time to develop a startup ecosystem for the further growth of Sports Economy as sure.

STARTUPS - MICRO SEGMENTS

1. Ventures
2. Employment
3. Events, Avenues
4. Leisure Sports

Sectors		Micro Segments	Quantity	Income from different heads (All Counts in Crores)										Total (Cr.)					
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption		Govt. Grants	Services	Sales		
Startups		Ventures																0	
		Employment																	0
		Events, Avenues																	0
Grand total																		0	

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

NUTRITION & WELLNESS

The wellness industry represents 5.3 percent of global economic output. Among the 10 wellness markets analyzed, revenue growth leaders from 2015–2017 (per annum) were the spa industry (9.8 percent), wellness tourism (6.5 percent) and wellness real estate (6.4 percent).

The global wellness economy is currently valued at \$4.5 trillion (2018 data). Wellness expenditures (\$4.5 trillion) are more than half as large as total global health expenditures (\$7.8 trillion, based on WHO data). The industry grew by 6.4 percent annually from 2015–2017, from a \$3.7 trillion to a \$4.2 trillion market, nearly twice as fast as global economic growth (3.6 percent annually, based on IMF data).

The wellness industry in India is also growing in similar pace. Kerala is a huge market for wellness products and services. Direct selling is one of the major beneficiary in Kerala.

NUTRITION & WELLNESS - MICRO SEGMENTS

1. Manufacturing
2. Retailing
3. Online Sales & Delivery
4. Researches
5. Wellness Centers
6. Technology Platforms
7. Employment
8. Direct Selling
9. Ayurveda Wellness

Sizing Sports Economy

Attribution of Sports Economy

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)												Total (Cr.)									
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services		Sales								
Nutrition, Wellness	Manufacturing					25																	75	
	Retailing				10																			60
	Online Sales & Delivery																						300	300
	Technology Platforms																							0
	Researches																							0
	Wellness Centers																					10		10
	Employment										200													200
	Ayurveda Wellness																							0
	Direct Selling																							0
	Spa																							0
Wellness Real estate																							0	
Grand total															645									

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

HIGH VALUE SPORTS

We have 4 well equipped Golf Courses in the State. The CIAL Golf course membership over subscribed when it opened in the beginning. It's a clear indication that more people are interested in high value sports like Golf, Billiards, Snooker, Squash etc. Its all are not just play stations, but multi entertainment centers.

The increasing no. of Upper middle class population and their aspirations & lifestyle is a booster to such high value games.

HIGH VALUE SPORTS - MICRO SEGMENTS

1. *Infrastructure*
2. *Events*
3. *Training*
4. *Employment*

Sizing Sports Economy																							
Attribution of Sports Economy																							
Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)																				
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services	Sales	Total (Cr.)							
High Value Sports	Infrastructure																						
	Events																				10	10	
	Training																					0	0
	Employment																						0
		Grand total											10										

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS MANAGEMENT & MARKETING

Sports marketing is premature stage even now in our state. Corporate are getting more interested in Sports branding. Kerala is a consumer state and large companies especially the FMCG manufactures eyes on Kerala Market carefully. Keralites are generally sports enthusiasts and sports branding is one of the most appropriate channel to influence the consumers. But Sports associations and Sports organisers are not utilizing this opportunity. Sports celebrity management is also very weak. Developing Leagues, Conducting events, Building up professional Clubs, Creating Screen & digital products, Moulding Sports management professionals etc are crucial for sports marketing.

SPORTS MANAGEMENT & MARKETING - MICRO SEGMENTS

1. Branding
2. Advertising
3. Celebrity Management
4. Event Marketing
5. Sports Talent Management

Sectors		Micro Segments	Quantity	Income from different heads (All Counts in Crores)												Total (Cr.)		
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants	Services		Sales	
Sports Marketing	Branding																15	15
	Advertising																0	0
	Celebrity Management																0	0
	Event Marketing																0	0
Grand total																15		

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

PUBLIC AMENITIES

We have needed public sports, fitness and wellness facilities. Morning and evening walks are now common but enough walkways are not available. Its unsafe to use roads for walking. Accidents are common. Have to develop smart walkways in the cities and in the rural areas.

Kids and youngsters have shortage of public playgrounds. Local bodies has to develop playgrounds by utilising vacant space. The public gym developed with the walkway at Marine drive is a successful model. Metro Kochi is facilitating and promoting Cycling through a special scheme.

PUBLIC AMENITIES - MICRO SEGMENTS

1. *Walkways*
2. *Open Gymnasiums*
3. *Cycle tracks*
4. *Open Public playgrounds*

		Income from different heads (All Counts in Crores)											Total (Cr.)				
		Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales		
Public Amenities	Micro Segments	Quantity															
	Walkways															2	2
	Open Gymnasiums															2	2
	Open Public playgrounds															2	2
Grand total																6	6

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SPORTS SERVICES

Service sector in Sports Industry is connected directly with Events, Infrastructure, Training etc. The elements in the service sector ranges from printing to digital display. Basically it's close to the requirement of conducting events. Even though it is scattered its substantially a big economic activity while compile all sports facilitation services.

Building temporary galleries and other facilities for Sevens, Boat League, Tug of War is a vast area in the service sector.

SPORTS SERVICES - MICRO SEGMENTS

1. Printing
2. Lights, Sound
3. Turfs
4. Signages
5. Display Boards

Sectors		Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)			
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales	
Services		Printing																2
		Lights																1
		Turfs																2
Grand total															5			

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

SCHOOL, COLLEGE SPORTS

School, College sports is considered as a govt. funded area conventionally. But in United States College Sports itself is a big avenue. Its truly commercial. The Government is not funding. Major companies are involved in Sports trainings at Schools and Colleges. They charges fees for the training. School, College Leagues are very popular. It's getting commercial branding and sponsorship support.

Kerala School Annual Athletics & Games is Asia's biggest in the size in this category. The meet is being conducted from School levels.

SCHOOL, COLLEGE SPORTS - MICRO SEGMENTS

1. University Physical Education- Gen
2. University Physical Education-Special
3. School Physical Education- General
4. School Physical Education- CBSE
5. School Physical Education- Sports Schools

Sectors		Micro Segments	Quantity	Income from different heads (All Counts in Crores)											Total (Cr.)				
				Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption	Govt. Grants		Services	Sales		
College Sports		School Physical Education-General			10													40	
		School Physical Education-CBSE																	0
		School Physical Education-Sports Schools																	0
		University Physical Education-Gen																	0
		University Physical Education-Special																	0
		Grand total																	

Sizing attribution is done on the basis of selected micro segments and with a projected quantification of micro segments, thus to achieve the total valuation of the sector.

WATER SPORTS

Water Sports in Kerala needed a special attention. The state is having a lengthy seashore, many backwaters, rivers, waterbodies, ponds and all these are natural resources. There is a rich and vibrant culture also related with these. We have an indigenous sports Boat Race which is a Sports-Tourism product now. Kerala produced many great talents in Swimming and is continue. The new generation Schools and colleges are setting up aquatic facilities like swimming pools and is becoming a trend. Students and public using these in a viable pay and use model. The Swimming is considered as one of the best fitness practice. Watersports has many events in Olympics like Canoeing, Kayaking, Rowing, Swimming, Water polo so on. In swimming itself many different categories included in Olympics and world championships. Kerala has a great potential which is still untapped. Some special schemes needed to explore the opportunities. We need more professional academies to nurture the talent. An overall revamp is required. A detailed study is necessary before approach the segment.

WATER SPORTS - MICRO SEGMENTS

1. Swimming
2. Canoeing
3. Kayaking
4. Rowing
5. Boat Race
6. Diving

ADVENTURE SPORTS

While some people have fun playing cards or shopping, other people have fun jumping off cliffs, climbing up mountains and smashing into roaring waves. These extreme sports enthusiasts take on nature's most menacing qualities, hoping to survive and conquer. Although the definition of "adventure sports" explains the general characteristics of the activity, it does little to express the adrenaline,

danger and thrill associated with extreme sports.

WATER SPORTS - MICRO SEGMENTS

1. Trekking.
2. Caving
3. Parasailing.
4. Flyboarding.
5. Skydiving.
6. Flying Fox.
7. Rock Climbing.
8. Bungee Jumping.
9. Scuba Diving
10. Mountain Biking

NON CONVENTIONAL SPORTS

This sector includes certain international sports which are very famous like drone racing, car racing etc.. The cash flow is huge.

NON CONVENTIONAL SPORTS - MICRO SEGMENTS

1. Kite Flying
2. Drone Racing
3. Byke Race
4. Car Race
5. Mud Races
6. Futsal
7. 3x3 Basketball
8. Water Rafting
9. Beach Volleyball & Football
10. Water Volly & Basket

Sports is a great employment generator. More youngsters and General public is now considering Sports as a full time Career. Any one opt sporting as a Career there is enormous opportunities to grow worldwide. As the emergence of professional leagues tremendous opportunities are there for sporting talents.

Central Government, State Government, Public Sector, Railways and Defense Services and Police are recruiting sporting talents every year. About 10,000 Plus opportunities in core sporting areas and more than 25,000 openings in allied sectors in every year in India. It will increase with the emergence of Sports as an Industry. Involvement of private sector also causes the increase in employment.

Sports Management, Training, Analysis, Equipment Manufacturing, Wellness products, Sports products sales etc create vast opportunities in terms of employment. When the Economy in Sports evolves more opportunities will be created in Construction, Services, Media and Operation. Majority of them will be indirect. But it is calculated huge by number

Sectors	Micro Segments	Quantity	Income from different heads (All Counts in Crores)										Total (Cr.)					
			Sporting	Recreation	Rental	Investments	Membership	Sponsorships	Salary	Contributions	Ticket Sales	Consumption		Govt. Grants	Services	Sales		
Employment	Sports Club Recruitments	500									25							25
	Sports Quota- Kerala	3000									500							500
	Sports Quota- National	800									700							700
	School, College Teachers										450							450
	Full time Coaches										50							50
	Sports Management										10							10
	Construction- Indirect										25							25
	Event Based- Contract										10							10
	Media										5							5
	Supporting Systems										3							3
Associations										3							3	
																		1781
																		Grand total

The activities of Physical, Sporting, Fitness and Wellness with its allied, complementary and supplementary areas contributed a sum of *Rs. 8560.85 Crores* towards Kerala GSP in 2020-21. This arrives through a basic research done by using the secondary data available.

The annual GSP of the state is *₹ 9.78 lakh crore* in 2020-2021.

The contribution of Sports and related sectors comes nearly *1% (0.875%)*. This comes without any additional efforts.

There is huge potential to grow the segment with targeted Schemes, Projects and Programmes. Can expect a contribution of *3-4% in 4 years* with a massive drive in the segment. This is most appropriate time for the same.

Most Potential Segments of Growth

- Sports Events including Leagues in popular Sports
- Leagues in Indigenous Sports
- Sports Turfs, Arenas and Multi sports complexes
- High Performance centers
- Centers of Excellence- Upgraded to Excellent centers
- Academies/ Feeder Centers in different levels in potential Sports
- Home/ Community/ Recreational / Institution Sports- Infra, Events, Plays
- Professional Clubs in Popular Items
- School & College Sports- Infra, Coaching, Events
- Construction and maintenance of Facilities
- Root level talent development Programmes in both popular and potential items
- Sports goods, apparel and lifestyle retailing
- Sports goods manufacturing
- Sports startups- Coaching, Events, Analytics, Skill development, Fitness, Wellness, Health
- Technology embedded networking, platforms
- Public amenities in Sports and Fitness
- Wellness solutions- Ayurveda, Ayush and Modern stream- Services and Products
- Sports Medicine- Ayush and Modern stream
- Science, Technology and Research Centers
- Science, Technology, Engineering, Management & Media- Education & Training
- Sports Marketing, Management, Event Management, Celebrity Management, Operations, Services Agencies
- Placement & Recruitment Services
- High Value Sports facilities- Gold, Snooker, Billiards
- Water Sports- Organised facilities, Events, Training
- Adventure Sports- Avenues, Events
- Sports Media- Digital Products, Events to Screen, Content, Production.

Setting targets in each sectors with quantifiable results

SEGMENTS	2021	2022	2024
Sports Arenas	1200	1500	2000
Professional Football Clubs	17	23	34
Football Grounds (National Standards)	29	36	50
Synthetic Tracks	7	14	22
Sports Complexes	6	11	30
Football Academies(Affiliated)	145	250	315
Fitness Centres	679	1200	2500
Sports Retailers	1310	1600	2200
Recruitments	450	700	2100

It can be possible to set targets on each and every micro segments to attain the goal. The above given is a model and is prepared on the basis of available secondary data. The projection shall be made with the original data after the ground survey.

The changes that occur as a result of the sports economy mission are numerous and This typically involves improvements to certain projects, innovations and many more. With a clear short, we can list certain outcomes as below:

- ★ Quantified results and outcome
- ★ Filled with throughout events and happenings
- ★ Proper system, follow ups and continuation in the process
- ★ Target specific plans and workflow
- ★ ERP like technology network with multiple interface where entire workflow is consolidated, that will provide better clarity on the activities.
- ★ Investment inputs apart from the Government
- ★ Starts business become a financially viable proposition
- ★ Participation of Private Sector
- ★ Involvement of many more stakeholders
- ★ More entrepreneurial opportunities
- ★ Opportunities for Startups
- ★ Contribution to GSP and the whole Economy
- ★ Employment generation- Direct & Indirect
- ★ Placement outside the state ensure inflow
- ★ Growth in allied segments like Construction, operations, Services
- ★ The Sports market will be expand
- ★ The consumption will increase
- ★ Opportunities of the retailers will substantially increase
- ★ An ecosystem will be developed for Sports Goods manufacturing and related industries

- The first Indian state to build up a 'Sports Economy'
- Another successful 'Kerala Model' following the saga of Literacy, Primary Education, Healthcare, Resourceful Manpower and Tourism.
- All inclusive sports
- Sports for change
- Focus to Economic and Non Economic Outcomes
- Multi Dimensional Impact
- Health care spend can be reduced
- Government Investment in Sports become minimal

