

HAVAS Play

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**EMERGING
SPORTS:
INDIA'S NEXT
BILLION-DOLLAR
SPORTS MARKETING
OPPORTUNITY**

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FOREWORD

For years, India was seen as a one sport nation. Cricket for us isn't just a game, it is a cultural monolith, a marketing engine, a national obsession. But quietly, and then all at once, the landscape began to shift and accommodate more sports than ever before.

Today, we stand at the edge of a thrilling new era. From packed kabaddi stadiums and surging football fanbases to rising stars in athletics, badminton, wrestling, chess, hockey, javelin, archery and more, India is rewriting its sporting narrative. This is no longer a blip. It is a movement to excel and demonstrate we are a sporting nation beyond cricket.

At Havas Play, we see this momentum as a transformation. That is why we built this report. Not simply to document the change, but to decode its implications. For brands seeking relevance, for marketers chasing resonance, and for stakeholders hoping to play a meaningful role in this unfolding story, this report is your field guide.

What you will find here is a strategic and cultural lens on the new India of sport. Data, with emotion. Insight, and foresight. Because sports in India today is not just entertainment. It is an identity, a community, an aspiration, and influence. It is building new super heroes who all have become household names. This shift presents an extraordinary opportunity not just for Indian sport, but for global businesses. To build affinity, to innovate partnerships, to shape narratives that move people. We are seeing the rise of a new kind of fan, a new kind of brand engagement, and a new kind of India. Dive in. The game is changing, and this is your invitation to play.

Rana Barua
Group CEO, Havas India,
South East Asia & North Asia
(Japan & South Korea)



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EXECUTIVE SUMMARY

THE RISE OF EMERGING SPORTS IN INDIA: A MULTI-SPORT REVOLUTION

(India's Sporting Renaissance)

India's sporting narrative has long revolved around cricket. While the 1983 World Cup sparked national pride and the IPL turned cricket into big business, a broader revolution is now unfolding. Backed by corporate investment, digital access, and Olympic ambition, emerging sports are steadily gaining ground.



In 2024, emerging sports generated ₹2,559 crore - 14% of India's sports industry revenue - with 24% annual growth. Cricket, meanwhile, saw its market share dip and growth slow to 14%.

Leagues like the Pro Kabaddi League (PKL) and Indian Super League (ISL) have carved out loyal followings and attracted major sponsors like Dream11, Tata, Hero MotoCorp, Puma, JSW and Adidas.. The Paris Olympics further boosted visibility, drawing big-ticket sponsors including Reliance and Adani Group.

Participation-based sports are thriving too. Marathons in Mumbai, Delhi, and Bengaluru drew massive turnouts, with running alone accounting for 24% of all emerging sports sponsorships last year.

Indian brands are also going global. Tech Mahindra, Apollo Tyres, and CEAT have forged partnerships in chess and international football. BKT Tires sponsors global leagues across rugby, basketball, and motorsports.

Cricket still leads, but its monopoly is fading. With growing investment, digital engagement, and grassroots programs, India is evolving into a dynamic, multi-sport nation.

India's \$52 billion sports economy is expected to grow to \$130 billion by 2030 at a 14% CAGR. While cricket remains central, kabaddi, football, badminton, combat sports, and esports are powering the next wave, driven by urbanization, digital reach, and brand interest.

The shift began after India's record six-medal haul at the 2012 London Olympics. This period also saw the emergence of big ticket leagues like Indian Super League in 2013 and Pro Kabaddi League in 2014. With India now bidding to host the 2036 Olympics, the momentum is gaining a massive surge.

As India's sports scene diversifies, the next billion-dollar opportunity lies not on the cricket pitch—but across arenas, tracks, courts, and gaming screens.

WHAT'S DRIVING THE SHIFT:

Digital platforms fueling broader sports viewership

Rising incomes increasing spending on fitness and fandom

Sponsorship expanding beyond FMCG and auto to tech, oil, and finance

Government backing, with over ₹1,700 crore invested in infrastructure in five years

A NATION IN PLAY:

HOW INDIA'S SPORTS LANDSCAPE IS EVOLVING

India is no longer a one-sport nation. While cricket continues to dominate headlines and hearts, 2025 marks a pivotal shift in India's sporting ecosystem. From the bustling metros to tier-2 towns and rural heartlands, fans are embracing a vibrant tapestry of sports - kabaddi, football, wrestling, athletics, badminton, basketball, and more.

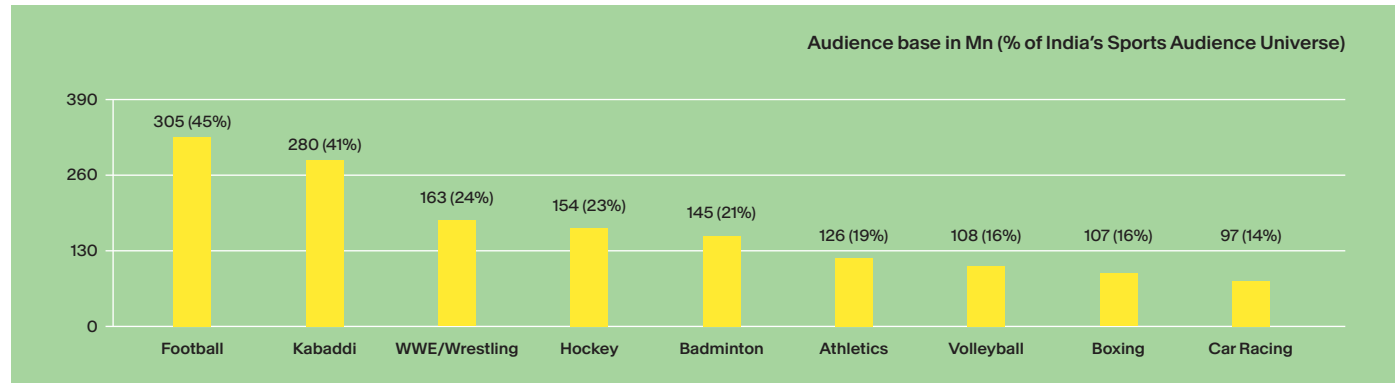
Combined TV and OTT viewership data that underscores this transition

IPL 857mn	Pro Kabaddi 350mn	Indian Super League 232mn	Women's Premier League 130mn
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Key Growth Drivers of India's Evolving Sports Market

Factor	Impact
Youth Demographics & Urbanisation	Over 65% of the population is under 35, and with rapid urban migration, young fans are consuming diverse sports content.
Affordable Internet & OTT Penetration	750+ million internet users enable cross-device live sports streaming, driving regional and national fandom.
Government Backing & Grassroots Push	Schemes like Khelo India and Fit India Movement are enhancing infrastructure and training at the grassroots level.
Diverse League Ecosystem	Year-round programming through PKL, ISL, UTT, and more offers consistent engagement for brands and fans.
Female Participation	WPL, Olympic female medallists, and endorsements are changing the gender dynamics of sports in India.

Popularity of Emerging Sports in India (2024)



*Sports Audience' is defined as someone who watched sports content on TV or OTT in the last one year for at least 30 mins
*Football's high audience is attributed to ISL fans and European football leagues fans as compared to Kabaddi audience which is completely driven by the Pro Kabaddi League
Source: The Ormax Sports Audience Report: 2024

Investment Trends: Brand Involvement in Sports

GMR Group, Adani, Amul, Medanta, Aditya Birla Capital, and other big brands are signing multi-year deals with emerging sports via franchise ownership, jersey sponsorships, arena branding, and more.

JSW Sports: A powerhouse in Olympic sports investment, supporting 11 Paris 2024 medallists through high-performance centers in Bellary and Haryana.

Viewership Growth & Media Impact (2024)

League/Event	Total Viewership	TV Viewership	OTT Viewership
IPL	857 MN	464 MN	393 MN
Pro Kabaddi League	350 MN	310 MN	40 MN
Indian Super League	232 MN	190 MN	42 MN
Women's Premier League	130 MN	110 MN	20 MN
UEFA Champions League	125 MN	-	-
Premier League (EPL)	96 MN	-	-

Regional commentary, mobile-first OTT viewing, and fantasy integration have turbocharged viewer growth.

OVERALL SPORTS INDUSTRY DATA: 2023 VS 2024

Category	2023		2024		Growth % (2023 to 2024)
	INR CR	USD MN	INR CR	USD MN	
Sponsorship	7,445	897	7,820	931	05
Endorsement	900	108	1,080	129	20
Media Spends	7,550	910	9,380	1,117	24
TOTAL	15,895	1,915	18,280	2,177	15

Sport-wise Spending Distribution

Category	2023		2024		Growth % (2023 to 2024)
	INR CR	USD MN	INR CR	USD MN	
Cricket	13,829	1,666	15,721	1,872	14
Emerging Sports	2,066	249	2,559	305	24
TOTAL	15,895	1,915	18,280	2,177	15

Share by Segment

Year	2023	2024
Cricket	87%	86%
Emerging Sports	13%	14%

Source: HAVAS PLAY Sports Estimates Dollar Rate Assumed: 2023 – INR 83 | 2024 – INR 84

INDIA'S SUCCESS STORY: PARIS'24 OLYMPICS

India posted its second-best performance with 6 medals,
igniting widespread national pride and interest in Olympic sports



Year	Gold	Silver	Bronze
Paris 2024	-	01	05
Tokyo 2021	01	02	04

What's Fuelling India's Sports Market?



Rising disposable incomes and aspirational youth



E-commerce enabling massive sports merchandise markets



Homegrown heroes turning into national icons



Regional leagues and vernacular content fostering inclusivity



Fantasy gaming and gamification fueling second-screen experiences

EMERGING SPORTS THE SURGE DRIVERS: MARKET SIZE, SPONSORSHIP POTENTIAL & CHALLENGES

CROWN JEWELS



Market Size
₹900 Cr+ (\$100M+)

Sponsorship Opportunity
₹415 Cr+ (\$50M+)

Notable Players
Pardeep Narwal, Naveen Kumar, Pawan Sehrawat

Challenges
Limited international expansion, seasonal league structure hampers year-round engagement

Viewership
350 Mn

Key Sponsors
Dream11, ROFF, Shriram Finance, Parimatch

Rising Stars
Aslam Inamdar, Arjun Deshwal, Mohit Goyat

Infrastructure
Strong domestic structure with PKL, growing presence of state-run grassroots academies and university teams

Opportunities for Brands
High TVR during PKL, strong connection with rural and Tier 2 audiences, scope for brand-owned grassroots academies



Market Size
₹1,200 Cr+ (\$150M+)

Sponsorship Opportunity
₹665 Cr+ (\$80M+)

Notable Players
Sunil Chhetri, Anirudh Thapa, Gurpreet Singh Sandhu,

Challenges
Infrastructure and training gaps, inconsistent grassroots talent pipeline

Viewership
232M (ISL)

Key Sponsors
Nandini, Hero MotoCorp, ONGC, Indigo, Apollo Tyres

Rising Stars
Vikram Pratap Singh, Lalengmawia Ralte (Apuia)

Infrastructure
ISL clubs building academies, FIFA-standard stadiums, robust 2nd division football league (I-League) fueling the growth, school-level programs

Opportunities for Brands
Association with global football culture, youth-focused campaigns, franchise-based marketing via ISL, I-Lr



Market Size
₹1,000 Cr+ (\$103M+) Driven by Olympic success and Premier Badminton League - PBL

Sponsorship Opportunity
₹400 Cr+ (\$40M+)

Notable Players
PV Sindhu, Kidambi Srikanth, HS Prannoy

Challenges
Non-Olympic tournaments lack visibility, no year-round professional circuit

Viewership
Yonex, Tata Capital, PUMA, Inox, Amul, HSBC

Rising Stars
Lakshya Sen, Anmol Kharb, Tanvi Sharma

Infrastructure
National academies in Hyderabad and Bengaluru, private centers by Gopichand and Padukone, robust state tournaments

Opportunities for Brands
Olympic-driven brand endorsements, urban youth appeal, strong female athlete representation



Hockey

Market Size

₹1,090 Cr+ (\$100M+) India's hockey resurgence, HIL struggles

Sponsorship Opportunity

₹475 Cr+ (\$45M+)

Key Sponsors

Hero MotoCorp, Bisleri, JK Super Cement, APL Apollo

Notable Players

Manpreet Singh, Harmanpreet Singh, Savita Punia

Rising Stars

Vivek Sagar Prasad, Sharmila Devi, Princedeeep Singh, Arshdeep Singh

Challenges

Low fan engagement outside Olympics, limited urban fanbase

Opportunities for Brands

Patriotic positioning; grassroots revival in eastern India, visibility through HIL

Infrastructure

Government-backed stadiums, revival of HIL, Khelo India investments

Athletics

Market Size

₹2100 Cr+ (\$250M+) Olympics and Marathons success, Fitness and Endurance craze

Sponsorship Opportunity

₹540 Cr+ (\$65M+)

Key Sponsors

ASICS, TCS, Nike, PUMA India

Opportunities for Brands

Endurance gear, fitness apps, and health nutrition branding, mass participation

Infrastructure

Marathons in all major cities, upcoming high-altitude training centers, public-private partnerships emerging

Growth Factors

Improved training facilities, international exposure, and better nutrition programs

Notable Athletes

Hima Das (400m Sprint), Avinash Sable (Steeplechase)

Rising Stars

Amoj Jacob (400m), Parvej Khan (800m)

Notable Athletes

Increased sponsorship interest, especially from fitness and apparel brands

Sprinting & Middle-Distance Running

Marathon & Ultra Running

Growth Factors

Popularity of city marathons (Mumbai Marathon, Delhi Half Marathon)

Notable Athletes

Nitendra Singh Rawat, Sudha Singh

Rising Stars

Srinu Bugatha, T Gopi

Notable Athletes

Endorsements from sportswear brands and fitness supplements

RISING STARS

Market Size

₹1,245 Cr+ (\$150M+) Olympic success, Super Fight League - SFL growth

Sponsorship Opportunity

₹290 Cr+ (\$35M+)

Key Sponsors

Fitness brands and apparel companies

Notable Players

Bajrang Punia, Vinesh Phogat, Neeraj Goyat

Rising Stars

Anshu Malik, Arjun Kadian

(MMA, Wrestling, Boxing)

Challenges

Fragmented leagues, limited monetization of fandom

Opportunities for Brands

Olympian endorsements, fitness brand campaigns, training equipment and sportswear

Infrastructure

SAI & JSW-funded training centers, strong state-level base in Haryana, Manipur and UP

ESports

Market Size

₹1,100 Cr+ (\$130 M+) 500M+ gamers, 100M+ in competitive gaming

Sponsorship Opportunity

₹875 Cr+ (\$85M+)

Key Sponsors

Intel, Red Bull and HP

Notable Players

Mortal (Naman Mathur), ScoutOP (Tanmay Singh), Jonathan

Rising Stars

Sensei, Xyaa

Challenges

Regulatory uncertainty, overdependence on foreign platforms

Opportunities for Brands

Massive Gen-Z reach, branded tournaments and gaming influencer campaigns

Infrastructure

Esports lounges, boot camps and competitive leagues in cities like Mumbai, Bengaluru

Market Size

₹1,675 Cr+ (\$200M+) Growing interest due to professional leagues and corporate support

Sponsorship Opportunity

₹500 Cr+ (\$60M+)

Key Sponsors

Rolex, Hero MotoCorp, and Callaway

Notable Players

Anirban Lahiri, Shubhankar Sharma, Aditi Ashok

Rising Stars

Kartik Sharma, Avani Prashanth

Challenges

High entry cost, lacks mass appeal

Opportunities for Brands

Corporate tournament visibility, elite positioning, growing female golf audience

Infrastructure

Private clubs (DLF, Eagleton), IGU programs, JSW and Hero investing in athlete development

Golf

Tennis

Market Size

₹2,150 Cr+ (\$200M+) Driven by Grand Slam performances and ATP/WTa tournaments

Sponsorship Opportunity

₹830 Cr+ (\$100M+)

Key Sponsors

Nike, Adidas and Amul

Notable Players

Rohan Bopanna, Sumit Nagal, Ankita Raina, Yuki Bhambri

Rising Stars

Sahaja Yamalapalli, Manas Dhamne, Shrivalli Rashmikaa Bhamidipaty

Challenges

Inconsistent pipeline, very few ATP/WTa events hosted in India

Opportunities for Brands

Urban upper-class engagement, global appeal with Indian players in Grand Slams

Infrastructure

AITA-accredited academies in metros, need for ATP-level facilities and tournaments

ON THE FAST TRACK

Basketball

Market Size

₹1,200 Cr+ (\$150M+) NBA Academy India driving interest

Sponsorship Opportunity

₹250 Cr+ (\$30M+)

Key Sponsors

NBA partnerships, Pepsi Adidas and Nike sponsorships

Notable Players

Amjyot Singh, Satnam Singh, Princepal Singh

Rising Stars

Amaan Sandhu, Harshwardhan Tomar

Challenges

Lack of professional domestic league, limited scouting programs

Opportunities for Brands

NBA affiliation, urban youth appeal, grassroots school programs

Infrastructure

NBA Academy in Greater Noida, court access in private schools and urban areas

Urban fan base growing at 31% YoY

Table Tennis

Market Size

₹650 Cr+ (\$75M+) Ultimate Table Tennis - UTT expanding reach

Sponsorship Opportunity

₹210 Cr+ (\$25M+)

Key Sponsors

IndianOil, Stiga Sports, Bisleri, Six5Six, Cosco, Butterfly

Notable Players

Achanta Sharath Kamal, Manika Batra, Sathiyan Gnanasekaran

Rising Stars

Sreeja Akula, Payas Jain

Challenges

Limited mass following outside national events

Opportunities for Brands

UTT's rising reach, Olympic visibility, integration into school sports

Infrastructure

State associations and clubs active, infrastructure developing across schools and training centers

Volleyball

Market Size

₹830 Cr+ (\$100M+) Prime Volleyball League growing viewership

Sponsorship Opportunity

₹165 Cr+ (\$20M+)

Key Sponsors

RuPay, Nippon Paints, Amul Kool, SBI, Vector X, Cred

Notable Players

Ashwal Rai, Karthik Ashok, Jerome Vinith

Rising Stars

Muthusamy Appavu, Rahul Kharb

Challenges

Fanbase conversion post-Pro Volleyball League, league consistency

Opportunities for Brands

Mass participation in colleges, opportunity for women's league

Infrastructure

Indoor courts in educational institutions, limited league-standard venues



Shooting

Market Size

₹2,490 Cr+ (\$300M+) Popular Olympic sport in India with steady investment

Sponsorship Opportunity

₹580 Cr+ (\$70M+)

Notable Players

Abhinav Bindra (Olympic Gold), Manu Bhaker, Saurabh Chaudhary

Opportunities for Brands

Olympic medal potential, gear brands, eyewear, nutrition tie-ins

Key Sponsors

JSW Sports, Olympic Gold Quest, Coca-Cola, Pernod Ricard

Rising Stars

Rudranksh Patil, Esha Singh, Sarabjot Singh

Infrastructure

NRAI Shooting Range in Delhi and Bhopal, Government-funded ranges, Gagan Narang Academy, JSW-backed shooters

Challenges

High equipment cost, fragmented private sponsorship

Chess

Market Size

₹1,350 Cr+ (\$150M+) Growing rapidly due to India's strong presence in global tournaments

Sponsorship Opportunity

₹830 Cr+ (\$100M+)

Notable Players

Viswanathan Anand, Pentala Harikrishna, Vidit Gujrathi, Koneru Humpy

Opportunities for Brands

Massive youth base, ed-tech, cognition-based products

Key Sponsors

Adani, IOCL, Ambit, Murugappa Group, Persistent

Rising Stars

R Praggnanandhaa, D Gukesh, Arjun Erigaisi, Vaishali Rameshbabu

Infrastructure

State-level chess bodies active, strong digital-first ecosystem, Chennai as global hub

Challenges

Over-reliance on digital play, insufficient offline events

WILD-CARDS

Pickleball

Pickleball is rapidly gaining traction in India, emerging as a dynamic, accessible sport that aligns with modern urban lifestyles. Combining elements of tennis, badminton, and table tennis, it's easy to learn, social, and requires minimal space - making it ideal for crowded cities. With over one lakh recreational players across 17 states and projections aiming at a million by 2028, its popularity is soaring. The sport's inclusive appeal attracts all age groups, while corporate and community engagement has boosted visibility. Events like the World Pickleball League have further amplified its competitive edge, positioning it as India's next big fitness and recreational movement.

Market Size

₹415 Cr+ (\$50M+) Fastest-growing urban sport, 100,000 regular players in India

Sponsorship Opportunity

₹85 Cr+ (\$10M+)

Notable Players

Ashish Sajani, Manish Rao

Key Sponsors

Fitness and apparel brands

Rising Stars

Pranav Sharma, Sanya Goel

Challenges

Early-stage sport, low awareness

Opportunities for Brands

Recreational wellness trend, school and senior fitness integration

Infrastructure

DIY courts emerging in societies, new clubs in Mumbai, Delhi, Pune

Once overlooked, para sports in India are now gaining well-deserved recognition. Record-breaking performances at the Paralympics and from increasing sponsorship support from the Government, Corporations, and CSR Initiatives, Indian para-athletes are making a global impact.

Para Sports

Notable Players

Avani Lekhara, Devendra Jhajharia, Sumit Antil

Challenges

- Limited mainstream visibility and media coverage
- Inconsistent funding outside of Paralympic years
- Accessibility barriers in training infrastructure and facilities
- Lack of regular, structured competitive circuits for para-athletes

Opportunities for Brands

- High emotional equity and inspiring storytelling – ideal for purpose-driven campaigns
- Rising national pride post multiple Paralympic medals (29 in Paris Paralympics'24)
- Scope for CSR, DEI, and inclusive sports initiatives.
- Associations with elite athletes have strong brand resonance

Infrastructure

- SAI-backed training centers with accessibility upgrades
- Private support from entities like OGG, JSW Sports, and GoSports Foundation
- National Para Championships and Khelo India Para Games gaining traction
- Need for regional talent hubs with assistive technology and physiotherapy support

Source: Industry Sources



WHAT'S FUELLING INDIA'S SPORTS MARKET, AND HOW?

INDIA'S SPORTS SURGE IS FUELLED BY 6 CORE AND 4 ALLIED SUB-SECTORS.

CORE SUB-SECTORS (DIRECT IMPACT ON SPORTS)

SUB-SECTOR	DESCRIPTION
Sporting Goods and Apparel	Manufacturing and retail of sports equipment and apparel, sports merchandise and memorabilia
Broadcasting and Promotions	Sports-related advertising, sponsorship, endorsement, and broadcasting
Fantasy Sports and Esports	Competitive virtual sports leagues and gaming tournaments
Sports Technology	Technologies that enhance athletic performance, training, and fan engagement (e.g., data analytics, VR/AR)
Sports Infrastructure	Active development, maintenance, and upgrading of sports facilities and stadiums
Facilitator Services	Professional services, sports medicine, live experiences (tickets and matchday sales), and sports education

ALLIED SUB-SECTORS (SECONDARY IMPACT ON SPORTS)

Nutraceuticals	Supplements and functional foods designed to improve athletic performance and recovery
Sports Tourism	Travel to and around sporting events, activities, and sports-related destinations
Wearables	Devices worn to monitor physical activity and health metrics (e.g., fitness trackers, smart rings)
Gyms and Fitness Centres	Dedicated fitness spaces or facilities offering access to equipment and training

Source: according to Google-Deloitte study

CORE AND ALLIED SUB-SECTORS ARE EXPECTED TO CONTRIBUTE EQUALLY TO THE SPORTING ECONOMY BY 2030

CORE SUB-SECTORS (DIRECTLY IMPACTED BY SPORTS-RELATED ECONOMIC ACTIVITIES)

SUB-SECTOR	2023 VALUE (USD)	2030 VALUE (USD)	CAGR
Sporting Goods and Apparel	\$24.9B	\$58B	13%
Broadcasting and Promotions	\$3.3B	\$6.7B	11%
Fantasy Sports and Esports	\$1B	\$1.8B	9%
Sports Infrastructure	\$0.3B	\$0.5B	8%
Sports Technology	\$0.3B	\$1B	19%
Facilitator Services	\$1B	\$2.5B	14%

ALLIED SUB-SECTORS (INDIRECTLY IMPACTED BY SPORTS-RELATED ECONOMIC ACTIVITIES)

Nutraceuticals	\$11.8B	\$40.2B	19%
Sports Tourism	\$7.1B	\$13B	9%
Wearables	\$1.4B	\$3.9B	16%
Gyms and Fitness Centers	\$1B	\$1.9B	10%

Source: according to Google-Deloitte study

I served as EVP and Head of Marketing at Star Sports at a crucial formative stage when India's major sporting leagues were being launched, redefining the landscape of sports entertainment. I had the privilege of creating and shaping immensely valuable intellectual properties that not only elevated the leagues but also transformed the way fans engaged with their favourite sports.

Across my journey with Visa, Star Sports, Royal Enfield, and Tata Motors, I have been deeply engaged in sponsoring, facilitating, and promoting sports, forging meaningful connections between brands and passionate sporting communities.

Witnessing the sheer passion, loyalty, and emotional investment of sports fans firsthand reinforced my belief that sports marketing is much more than visibility—it is about storytelling, fostering deep cultural connections, and building communities that thrive on shared moments of triumph and perseverance. This perspective continues to shape my approach to brand-building, where every association with sports is an opportunity to inspire and drive meaningful engagement.



Shubhramshu Singh
CMO, Tata Motors CVBU

WOMEN'S SPORTS REVOLUTION

In 2024, WPL reached 130 MN viewers, supported by brands like TATA, CEAT, Sintex, Herbalife, and Dream11. Viewership for women's events saw a 42% YoY growth. Female athletes are commanding national campaigns and redefining sporting narratives.

Despite India's rich legacy of female sporting icons - from PT Usha, Anju Bobby George, Sania Mirza, Mary Kom to Saina Nehwal, PV Sindhu, Manu Bhaker and Manika Batra - women's sports remain vastly underfunded and under-commercialized. Globally, women's sports have witnessed a surge in investment by 22% in 2023-24, yet in India, sponsorship and media coverage remain disproportionately low.

CURRENT MARKET SNAPSHOT

- Women's sports sponsorships account for less than 15% of total sports investments in India.
- The Women's Premier League (WPL) generated \$76 million in its debut season, proving the market potential.
- Women athletes like Manu Bhaker, Avani Lekhara, Manika Batra, and more are winning global medals, yet brand endorsements remain cricket-heavy.



GLOBAL BENCHMARKS: LEARNING FROM WNBA & BARCLAYS WOMEN'S SUPER LEAGUE



INDIA CAN TAKE INSPIRATION FROM SUCCESSFUL WOMEN'S SPORTS MODELS ABROAD:

LEAGUE	YEAR FOUNDED	2023 REVENUE	KEY LEARNINGS
WNBA (USA)	1996	₹1,660 Cr. (\$200M)	Long-term media deals, grassroots talent pipeline
Barclays Women's Super League (UK)	2011	₹556 Cr. (\$67M)	Corporate backing, parity-focused sponsorships
Women's Premier League (India)	2023	₹631 Cr. (\$76M) (Season 1)	High initial viewership, untapped fan engagement

Source: Statista

EMERGING SPORTS BRAND ENDORSEMENTS IN INDIA: A GROWING MARKET

India's sports marketing landscape is slowly but steadily undergoing a fundamental shift. While cricket remains dominant, emerging sports athletes are now securing major brand deals, thanks to their international success, expanding fanbase, and the diversification of India's sports culture.

The endorsement value of India's top emerging sports athletes is now crossing the ₹50 crore mark, proving that the next billion-dollar sponsorship wave lies beyond cricket.



ESTIMATED ENDORSEMENT EARNINGS (₹ CRORE)

ATHLETE	SPORT	ESTIMATED ENDORSEMENTS (₹ CRORE)	MAJOR BRANDS ENDORSED
PV Sindhu	Badminton	50+	Puma, VISA, Bridgestone, JBL
Neeraj Chopra	Javelin	35+	Bharat Petroleum (Speed), VISA, Noise, JSW Group, Gillette, Omega Watches
Manu Bhaker	Shooting	10+	Coca-Cola, Nothing India, Dabur Khajurprash
D Gukesh	Chess	8	RBL Bank, Cadbury Dairy Milk
Mary Kom	Boxing	5+	Nestlé, Herbalife, BSNL, Tata Salt

Source: Industry Sources



Emerging sports in India are no longer on the sidelines - they're becoming front and center. From kabaddi to esports, and athletics to MMA, the rise is real, fueled by grassroots talent, digital platforms, and a hungry young audience. It's no longer just about cricket - it's about a new era of diverse, dynamic sporting culture.

R Venkatasubramanian
Chief Operating Officer-Havas Play India

EMERGING ATHLETES: THE NEXT BIG ENDORSEMENT WAVE

AS EMERGING SPORTS ENDORSEMENTS GROW, EARLY INVESTMENTS IN EMERGING ATHLETES BY BRANDS CAN YIELD LONG-TERM RETURNS.

ATHLETES TO WATCH FOR FUTURE BRAND ENDORSEMENTS

SPORT	ATHLETES' NAME (AGE)	INSTAGRAM FOLLOWERS	POTENTIAL BRAND CATEGORIES
Hockey	Arshdeep Singh (20)	-	Energy Drink, FMCG, Infra
	Princedeep Singh (20)	970	
Golf	Shaurya Bhattacharya (22)	831	Streetwear, Ed-tech, Fintech, Sportswear, Smart Tech
Squash	Anahat Singh (17)	17.5K	Sportswear, Beverage, Energy Drinks
	Abhay Singh (26)	206K	
Chess	D Gukesh (18)	1.4M	Streetwear, Ed-tech, Fintech, Sportswear, Smart Tech
	R Praggnanandhaa (19)	842K	
	Nihal Sarin (20)	63K	
	Arjun Erigaisi (21)	90.1K	
	R Vaishali (23)	87.8K	
	Vantika Agrawal (22)	38.6K	
Tennis	Maya Rajeshwaran (15)	12.5k	Luxury Apparel, Beauty, Fitness
	Aryan Shah (19)	1630	
	Rethin Pranav (17)	498	
Table Tennis	Syndrela Das (15)	2244	Gaming, Smart Tech, Consumer Electronics
	Ankur Bhattacharjee (18)	4814	Education, Personal Finance, Digital Brands
Shooting	Manu Bhaker (23)	1.6M	Nutrition, Fitness Apps, Performance Wear
	Suruchi Phogat (18)	-	
	Sarabjot Singh (23)	56.1K	
Wrestling	Antim Panghal (20)	9371	Health Supplements, Sporting Goods, Insurance
	Aman Sehrawat (21)	131K	
Swimming	Dinidhi Desinghu (15)	3035	Sports & Active Wear, Luxury, Beauty, Fitness
Badminton	Anmol Kharb (18)	5197	Fitness, Tech

Source: SPORTSCOMM

TV & SOCIAL MEDIA – PKL

LEAGUE						
LEAGUE	TV REACH	TV RATINGS (AVG)	SEARCH VOLUMES	FACEBOOK	TWITTER	INSTAGRAM
Pro Kabaddi League	201M	0.67	147M	1.7M	367K	1M
PKL FRANCHISES						
FRANCHISE	TV REACH (000'S)	TV RATINGS (AVG)	SEARCH VOLUMES	FACEBOOK	TWITTER	INSTAGRAM
Bengal Warriors	93M	0.65	1.7K	724K	90K	201K
Bengaluru Bulls	89M	0.75	6.3M	1M	232K	827K
Dabang Delhi K.C.	87M	0.65	504K	895K	78K	211K
Gujarat Giants	92M	0.58	2.3K	404K	49K	246K
Haryana Steelers	91M	0.67	4.5M	384K	38K	328K
Jaipur Pink Panthers	99M	0.6	4.5M	743K	149K	328K
Patna Pirates	89M	0.67	4.8M	631K	587K	352K
Puneri Paltan	95M	0.67	6.2M	832K	124K	468K
Tamil Thalaivas	88M	0.67	6.4M	347K	107K	481K
Telugu Titans	108M	0.71	6.9M	472K	159K	333K
U Mumba	91M	0.61	3.9M	956K	139K	302K
UP Yoddhas	102M	0.65	3.6M	395K	43K	228K

Source: BARC | Period: 1st Jan – 31st Dec 2024 | TG: 2+U+R+TV |

TV & SOCIAL MEDIA – ISL

LEAGUE						
LEAGUE	TV REACH	TV RATINGS (AVG)	SEARCH VOLUMES	FACEBOOK	TWITTER	INSTAGRAM
Indian Super League	90M	0.1	25M	4.7M	863K	2.2M
ISL FRANCHISES						
FRANCHISE	TV REACH (000'S)	TV RATINGS (AVG)	SEARCH VOLUMES	FACEBOOK	TWITTER	INSTAGRAM
Bengaluru FC	32M	0.11	4.7M	459K	324K	589K
Chennaiyin FC	30M	0.08	4M	502K	876K	453K
East Bengal FC	28M	0.1	11M	1.3M	285K	214K
FC Goa	29M	0.1	2.5M	491K	356K	483K
Hyderabad FC	26M	0.08	881K	96K	39K	203K
Jamshedpur FC	26M	0.09	4.3K	171K	46K	219K
Kerala Blasters FC	34M	0.18	226M	1.3M	2M	3.9M
Mohun Bagan SG	35M	0.11	5.6M	1.3M	528K	784K
Mumbai City FC	30M	0.09	2.5M	666K	216K	426K
NorthEast United FC	27M	0	2.1M	438K	428K	334K
Odisha FC	26M	0.09	1.9M	64K	40K	169K
Punjab FC	24M	0.09	1.3M	36K	7K	55.3K
Mohammedan SC	24M	0.1	3.2M	37K	9K	231K

Source: BARC | Period: 1st Jan – 31st Dec 2024 | TG: 2+U+R+TV |



India's growing economy makes a billion-dollar emerging sports industry a real possibility. But this growth depends on expanding public sports infrastructure, with state and district-level support playing a key role along with the brands.

A successful 2036 Olympic bid could also trigger large-scale investment, but long-term impact will come from grassroots development - building accessible playgrounds, stadiums, and training centers to enable wider youth participation.



Rishi Narain
Former Asian Games Gold Medallist
& Golf Industry Veteran



THE BUSINESS OF HYPERLOCAL SPORTS FANDOM & FUTURE OF FAN ENGAGEMENT

Franchise leagues in Maharashtra (wrestling, kho kho), Tamil Nadu (volleyball), and Punjab (kabaddi) are gaining traction. OTT deals and regional brand sponsors like Goldiee Masale, Amrutanjan, and Aashirvaad Atta are joining the hyperlocal fan economy.

The Rise of Regional Sports Engagement

Indian states have long been associated with specific sports, shaping deep-rooted fan cultures:



Kabaddi in Haryana:

A legacy sport with deep rural penetration, fueling the rise of the Pro Kabaddi League (PKL).



Hockey in Punjab:

A historically dominant state in Indian hockey, with teams enjoying strong support in leagues like the Hockey India League.



Wrestling in Uttar Pradesh:

The akhara culture continues to produce international champions, with U.P. hosting major wrestling events.



Ocean Sports in Coastal Regions:

India's coastal regions are emerging as hubs for ocean sports, with surfing and stand-up paddling.



Football in Kerala:

The state's football passion has driven ISL's Kerala Blasters to one of the highest fan engagements in India.

These regional sporting cultures provide fertile ground for localized marketing strategies, with brands tapping into community-driven enthusiasm.



At the current growth trajectory - estimated at around 15–20% annual growth rate - emerging sports in India could potentially reach the ₹8,500 crore mark within the next 7–8 years, possibly sooner with the right ecosystem pushes.



Neeraj Jha
Director - Content, Programming & Acquisitions (Sports),
Warner Bros. Discovery



Government of Odisha

Odisha Government for Indian Hockey

Odisha's sponsorship of Indian hockey leveraged Odisha's historic connection to the sport.

**Hero for Indian Football**

- As the title sponsor of the Indian Super League (ISL), Hero MotoCorp focused on regional clubs like Kerala Blasters and Northeast United.
- Tailored digital campaigns in Malayalam and Assamese led to a 300% increase in regional engagement.

**Patanjali for Pro Kabaddi League (PKL)**

- With Haryana and U.P. as its primary markets, Patanjali positioned itself as a homegrown brand supporting traditional Indian sports.
- Regional tie-ups with local kabaddi teams led to a 35% rise in brand affinity in rural and tier-2 cities.

**Karnataka Tourism & TT Group for Ocean Sports**

- With India's vast coastline and tourism potential, TT Group and Karnataka Tourism positioned themselves as key supporters of ocean sports, fostering Stand-Up Paddling (SUP) and surfing as mainstream activities.
- Strategic partnerships with international SUP events and grassroots initiatives led to increased global recognition for India's potential as a leading ocean sports destination.

These brands capitalized on regional loyalty, proving that hyperlocal sponsorships yield high returns in engagement and sales.

Regional Sponsorship Growth & Digital-First Strategies

With the rise of vernacular digital media and OTT platforms, brands are shifting towards hyperlocal fan engagement models. Key trends include:

**Vernacular OTT Commentary**

Pro Kabaddi and ISL now stream matches in Hindi, Tamil, Telugu and Bengali, expanding regional fan bases.

**Localized Social Media Campaigns**

Kerala Blasters' Malayalam-first content has led to record-breaking engagement numbers on Instagram.

**Community-Driven Content**

Wrestling academies in UP and Punjab use YouTube and Instagram reels to drive grassroots awareness.

MEASURING ROI OF SPORTS SPONSORSHIPS

**Modern metrics beyond TVRs**

- Sales uplift in sponsoring zones
- High unaided brand recall in post-league consumer surveys
- Spikes in digital and OTT engagement
- Audience stickiness across languages

**AI, Data & Future of Fan Engagement**

- AI-led segmentation for fan profiles
- Predictive analytics to optimise ad spends
- AR/VR integrations for OTT and stadiums
- Gamified content driving Gen Z engagement

**Sports Infrastructure & Franchise Valuations**

- Pro Kabaddi teams now valued at ₹150–₹250 crore
- ISL franchises are seeing 20–30% annual sponsor growth
- Investments in high-tech stadiums and sports science centres are growing exponentially

**Sports-Tech Startups changing the Game**

- KheloMore, DreamSetGo, Huddle in fan and player engagement
- Wearable tech for athlete performance
- Smart ticketing and merchandise platforms
- Fan loyalty programs offering gamified tiers

**Regional Language Content & Creator Economy**

Bhojpuri, Tamil, Telugu, and Marathi creators are producing content rivaling mainstream studios.

From live match reactions to post-match tactical breakdowns, vernacular creators are winning trust - and ad spends.



HAVAS PLAY SPONSORSHIP EVALUATION PROCESS



01

On Screen
Brand Exposure
Logo duration
Logo frequency
Branding size

06

Market, OOH
& Surround
activation

02

Media Cost
& Value
Assessment

HAVAS Play
Sponsorship Evaluation
Process

05

Fan Response,
Engagement
& Activation

03

On Ground
Asset
Valuation

04

Social & Digital
Reach
& Engagements

Havas Play has been working on a robust sponsorship evaluation methodology which provides precise and fair valuations of sponsorship and media rights across platforms, enabling data-driven optimization of partnership portfolios.

Havas Play bridges audience insights and media analytics to value sponsorships and optimize partnership strategies thus creating meaningful brands.

Our media valuation expertise of sponsorship assets captures audiences across all media types from TV, Social, Digital, OTT, PR and Print while using one consistent methodology.

WHY BRANDS ARE INVESTING IN EMERGING SPORTS ATHLETES

Olympic & international success driving marketability

Athletes like Neeraj Chopra, PV Sindhu, and Manu Bhaker have put India on the global sports map. Their achievements make them ideal brand ambassadors for national and international

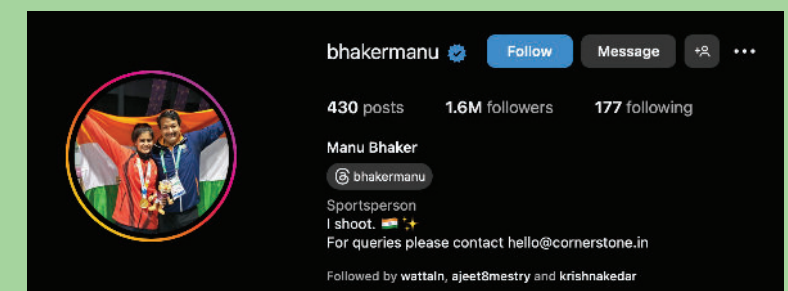
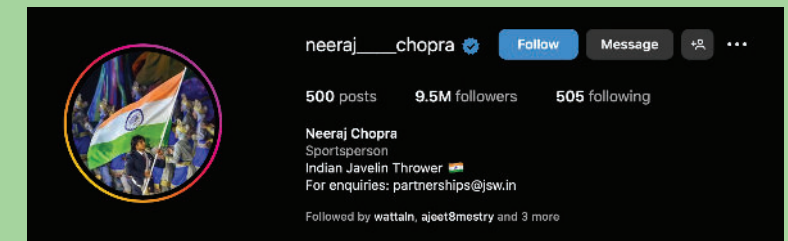
Expanding social media influence

Modern athletes are leveraging digital platforms to engage with fans directly, creating authentic brand partnerships. For example:

Manu Bhaker (1.6 million followers) and Neeraj Chopra (9.6 million followers) massive social media following on Instagram enhances their appeal to youth-centric brands D Gukesh's (1.4 million followers) chess dominance has resonated with digital-first audiences, making him an attractive choice.

Growing consumer interest in fitness & diverse sports

With a surge in health-conscious consumers, brands want to associate with athletes who inspire an active lifestyle. PV Sindhu, Mary Kom, and Manu Bhaker are prime examples of fitness icons who connect deeply with audiences beyond cricket.



Cross-brand sales and sponsorships

Emerging sports are creating high-engagement consumer touchpoints by combining the strengths of diverse industries. For instance, Tata Mumbai Marathon partnered with ASICS for performance gear and Herbalife Nutrition for wellness support, offering runners a complete health and fitness ecosystem. In esports, Red Bull teamed up with Intel and HP to co-create branded tournaments that combine energy, hardware, and gaming lifestyle. Similarly, JSW Sports leverages partnerships across Olympic sports like wrestling, football, and athletics to bring brands like Sony, Nike, and Welspun into cross-promotional campaigns.

ATHLETE	CATEGORY	SEARCH VOLUMES	FACEBOOK	TWITTER	INSTAGRAM
Lovlina Borgohain	Boxing	500K	127K	124K	210K
Mirabai Chanu	Weightlifting	1.2M	296K	441K	819K
Neeraj Chopra	Athletics	17.6M	1M	1M	9.5M
P V Sindhu	Badminton	3.8M	3M	3M	4M
Srikanth Kidambi	Badminton	276K	237K	1.1M	178K
Sunil Chhetri	Football	3.7M	1.6M	1.8M	8M
Manu Bhaker	Shooting	9.3M	72K	309K	1.6M
Manika Batra	Table Tennis	1.2M	314K	177K	700K

Source: Industry Sources



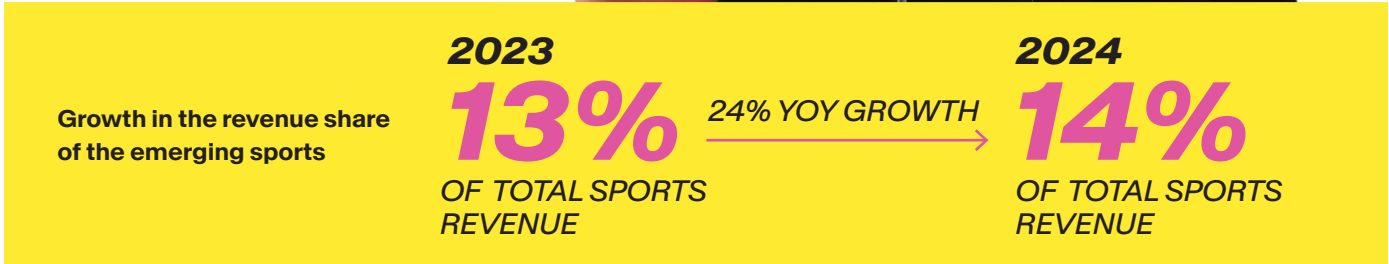
FUTURE OUTLOOK:
THE NEXT
DECADE OF
INDIAN SPORTS
MARKETING

India’s emerging sports economy is poised to cross **\$1 billion (₹8400+ crore) in 2030**. AI, immersive OTT experiences, rural broadband, and a booming middle class will converge to create a global sports superpower. Private investments, rising endorsements, and regional formats will shape a future where cricket is just one part of the conversation.

The billion dollar idea – why emerging sports are the next big investment

Emerging sports have steadily expanded over the years signaling a billion-dollar opportunity for early investors.

With the Paris 2024 Olympics boosting athlete endorsements and fan engagement, and new-age sports like Pickleball, Ultimate Frisbee, and Stand-Up Paddling gaining popularity, the investment landscape is broader than ever.



Projected revenue breakdown for emerging sports

Expected revenue of
India's emerging sports
industry by mid 2030

\$1B+
(₹ 8400 CRORE)

20%
EXPECTED CAGR

This is driven by key revenue streams:

Sponsorship & Brand Partnerships - \$350M to \$400M

Pro Kabaddi League (PKL):
₹200+ crore (\$25M)
Annual sponsorship revenue

Indian Super League (ISL):
₹250+ crore (\$30M)
per season from sponsorships

Other leagues (basketball, badminton, athletics):
~\$150M by 2030
Expected contribution with growing corporate interest

Key Brands Involved:
Tata, BYJU'S, JSW, Dream11, Puma,
Adidas, Red Bull

Media Rights & Broadcast Revenue - \$250M to \$300M

OTT & Digital Platforms Growth:
ISL, PKL, and esports leagues gaining traction
on JioCinema, Hotstar, and SonyLIV

TV Deals & Regional Broadcasts:
Star Sports, Viacom18, Sony Sports
acquiring emerging sports rights.

Projected Growth:
\$300M+ by 2031 Contribution of media rights
with the rise of regional viewership

Brands like SportsVault and SportsCast
are streaming the matches live on Youtube

Ticket Sales & Live Event Revenue - \$100M to \$150M

Football (ISL):
Stadium attendances rising post-pandemic,
expected to cross ₹830 crore (\$100M) by 2028-29

Kabaddi (PKL):
Stadium expansions increasing
match-day revenues

Basketball, Badminton, Athletics:
Growth of live events like Ultimate Table Tennis (UTT),
Premier Badminton League (PBL).

Esports & Fantasy Sports - \$150M to \$200M

Esports Viewership & Sponsorships:
India's esports industry projected to cross
\$100M revenue by 2025

Fantasy Sports (Dream11, MPL, My11Circle):
~10 crore users contributing to
massive engagement

Projected Contribution:
Esports & Fantasy Sports alone
could generate \$200M+ by 2028-29

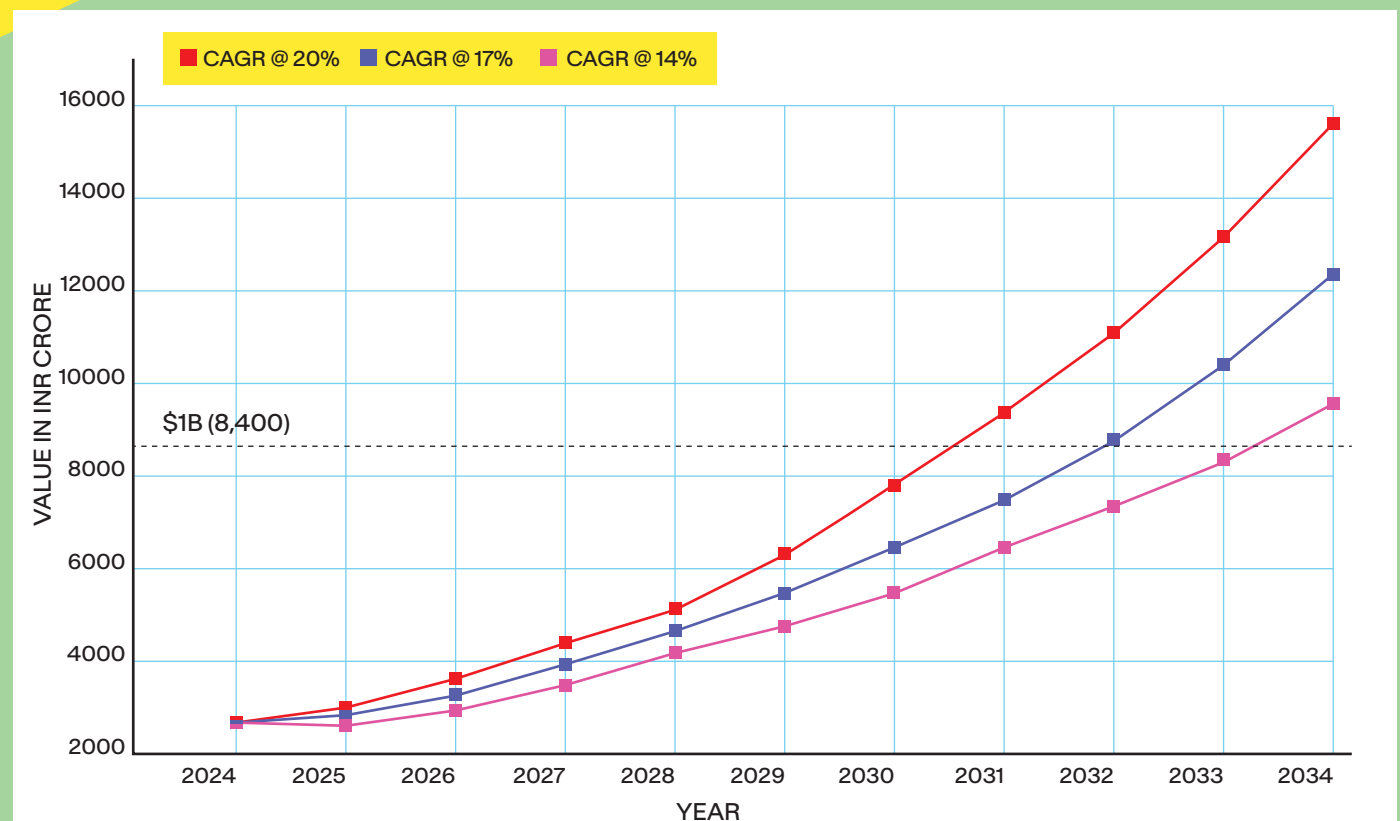
Merchandising & Licensing - \$50M to \$75M

Jersey & Merchandise Sales:
Football (ISL), Kabaddi (PKL), and Basketball (NBA India)
driving interest

Projected Expansion:
More global partnerships (Nike, Puma, Adidas)
and Indian brands (Six5Six) are expected
to increase merchandising revenue

Projected Contribution:
Esports & Fantasy Sports alone could generate
\$200M+ by 2028-29

CAGR Growth comparison (20% vs 17% vs 14%)

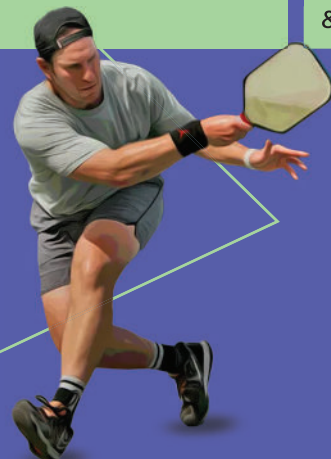


Timeline for India's emerging sports to cross \$1 Billion

2024	2026-27	2029	2031
Industry worth ~\$600M, driven by sponsorships and media rights	Esports and fantasy sports reach \$150M-\$200M, adding major revenue	Increased stadium capacity, higher ticket sales, and digital-first monetization models push revenues to \$900M+	With growing investments in infrastructure, regional league expansions, endorsements, and corporate sponsorships, emerging sports cross the \$1 billion mark

The Money Magnets - Traditional vs. New-Age Opportunities

TRADITIONAL INVESTMENT	NEW-AGE INVESTMENT
Franchise ownership in ISL, PBL, PKL, HIL	Equity stakes in new sports leagues like Pickleball, Ultimate Frisbee, and Surfing
Sponsorship deals with Olympic medalists	Personalized fan engagement via athlete-owned digital platforms
Stadium development & training academies	Tech-driven training centers, Coaching modules, Sports parks
Investments in youth academies & schools	AI-driven talent scouting platforms, adventure sports camps
Sponsorship in mainstream sports streaming (Disney+ Hotstar, JioCinema)	Investing in niche OTT platforms focused on alternative sports
Traditional advertising and branding	Esports, sports-based Metaverse & VR engagement



CONCLUSION

India's multi-sport revolution is not a trend—it's a tectonic shift. The rise of regional leagues, grassroots heroes, women's sports, and AI-powered fandom is democratizing sports consumption. As marketers, investors, and fans, we're witnessing the dawn of a multi-sport India—one that doesn't just play to win, but plays to transform.

AFTERWORD

As we turn the final pages of this report, one thing is undeniable — India is no longer a one-sport nation. What we are witnessing is not just a diversification of games, but a redefinition of sporting culture. This evolution goes beyond entertainment. It is identity, community, influence, and aspiration — unfolding across kabaddi courts, football grounds, wrestling mats, archery fields, and more.

For brands and marketers, this moment holds incredible promise. The rise of regional leagues and new sporting icons is opening up authentic avenues to engage with passionate, niche, and fiercely loyal fan bases. These are not mere touchpoints; they are cultural entryways — rooted in emotion, powered by community, and brimming with storytelling potential.

At Havas Media Network India, we see this not as a passing trend, but as a generational shift. The sporting landscape is transforming, and with it, so are the opportunities for brands to be relevant, resonant, and future-ready. Whether you're an advertiser, investor, or content creator, the field is wide open.

We hope this report inspires action. That it fuels bold ideas, fresh partnerships, and strategic moves anchored in the spirit of play. Because the game is not only changing — it is expanding. And now, more than ever, is the time to be part of this story.



Mohit Joshi
CEO, Havas Media Network India

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